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ABSTRACT

This document consists of nineteen task simulations designed for use in developing the office skills of business education students. Each task simulation unit includes a description of the task, procedures for performing the task, and a listing of materials needed to perform the task. The task simulations included cover: (1) folding and inserting letters; (2) arranging correspondence; (3) incoming mail; (4) rough draft copies; (5) typing file cards; (6) supply requisitions; (7) invoices; (8) duplicating; (9) personality quiz; (10) job resume and application; (11) typewriting and composing; (12) partnership agreements; (13) medical forms; (14) inserting paper tape for ten-key adding machines; (15) bank-related tasks; (16) accounting; (17) role playing; (18) case problems and studies; and (19) in-basket problems. (JDS)

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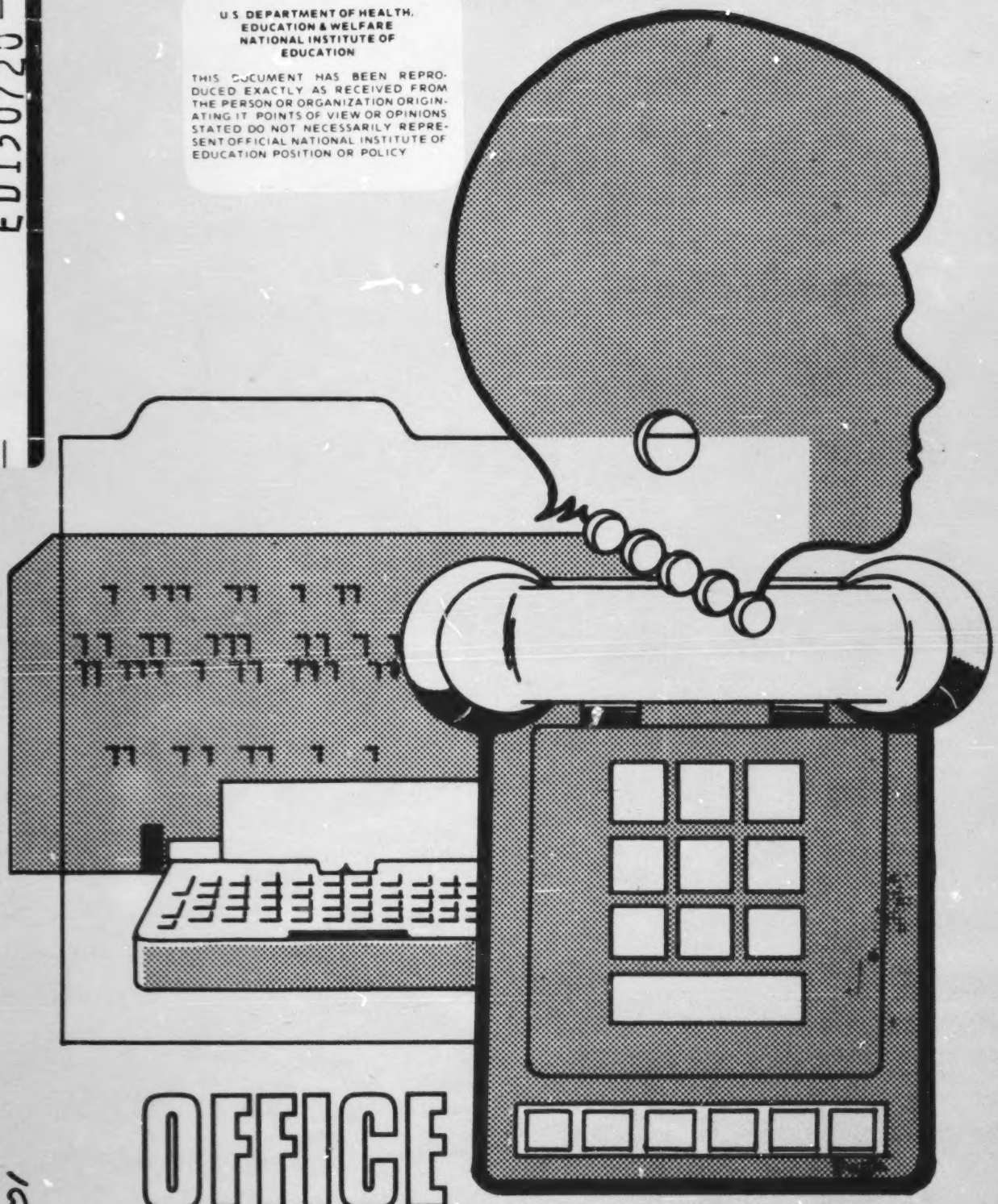

# OFFICE SIMULATION ACTIVITIES

2

PROGRAM DEVELOPMENT
DEPARTMENT OF COMMUNITY COLLEGES
RALEIGH, NORTH CAROLINA

JC 760 601

# OFFICE-SIMULATION ACTIVITIES

Prepared by a Class in BDE 599-D

Second Summer Session

July 8 - 24, 1974

Dr. George P. Grill, Instructor
Department of Business and Distributive Education
The University of North Carolina at Greensboro
Greensboro, North Carolina 27412



BEST COPY AVAILABLE

## FOREWORD

Simulation has been defined as a concentrated learning experience or exercise specifically designed to represent important real-life activities by providing the learner(s) with the essential elements of the real situation. The use of simulations provides the opportunity for the instructor to meet the needs, abilities, interests and career objectives of each student.

Business and office education instructors are beginning to look for means to bring "the job to the student" when it becomes difficult or impossible to send the student to the job. Office-Simulation Activities has been designed to provide the instructor(s) in business and office education with a realistic instructional tool to bridge the gap between theory and practice.

Roger G. Worthington, Director
Program Development Division

Ben E. Fountain, Jr., President
Department of Community Colleges

ACKNOWLEDGEMENTS

Appreciation is extended to the 1974 summer class in BDE 599-D, Department of Business and Distributive Education, The University of North Carolina at Greensboro, Greensboro, North Carolina for developing and sharing with the Program Development Division, Department of Community Colleges these office-simualtion activities.

Special appreciation is extended to Dr. George P. Grill, Instructor for this class, in sharing his ideas and assisting with the publication of these activities.

A special thank you to Barbara Robbins Greess for her patience and understanding while typing and coordinating the materials for this publication, and for her assistance in decision making.

Special recognition and thanks are also extended to William F. Pugh, Artist Illustrator, for designing the cover for this publication and to Mrs. Kathleen S. Poole for her assistance in coordinating and duplicating these materials.

# THE UNIVERSITY OF NORTH CAROLINA

## AT GREENSBORO

SCHOOL OF BUSINESS AND ECONOMICS

*Department of Business and Distributive Education*

February 28, 1975

Dear Educators

Simulation has emerged as one of the most realistic instructional tools available to educators in vocational education. It serves as an effective testing, training, and motivational device. An authentic simulation should contain three factors: (1) input documents realistic to those found on the job, (2) conditions realistic to those on the job, and (3) performance criteria realistic to those on the job.

As there are numerous kinds and forms of simulations, it was the primary purpose of the 13-day course, Simulations in Office Education, at The University of North Carolina at Greensboro, during the Summer of 1974, to develop three kinds of simulations that could be implemented by business and office education, as well as other vocational areas. Progressing from the simple to the complex, three kinds of simulations developed included (1) task simulations, (2) decision-making simulations, and (3) model office simulations. Through the utilization of these simulations, the student should be able to perform specific tasks and to make wise decisions.

The demand for capable, adaptable people in the world of work continues to grow rapidly. Simulations will provide a guide to educators in training future employees and for structuring present curriculum to meet the expectations of the business world today and tomorrow.

To each of the individuals who developed these simulations, the teaching profession and the instructor of this course are grateful.

George P. Grill

George P. Grill, Instructor
Simulations in Office Education




GREENSBORO, NORTH CAROLINA 27412

The University of North Carolina at Greensboro is a constituent institution of
THE UNIVERSITY OF NORTH CAROLINA

NAMES AND ADDRESSES OF CLASS MEMBERS

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| Section | Title | Number of Tasks | Color Code |
|---|---|---|---|
| A | FOLDING AND INSERTING LETTERS | 3 | Blue |
| B | ARRANGING CORRESPONDENCE | 1 | Green |
| C | INCOMING MAIL | 1 | Buff |
| D | ROUGH DRAFT COPIES | 8 | Goldenrod |
| E | FILE CARDS | 1 | Canary |
| F | REQUISITION | 1 | Gray |
| G | INVOICE | 1 | Pink |
| H | DUPLICATING | 6 | Cherry |
| I | PERSONALITY QUIZ | 1 | Ivory |
| J | DATA SHEET AND APPLICATION | 4 | Blue |
| K | TYPEWRITING AND COMPOSING TASK SIMULATIONS | 8 | Green |
| L | PARTNERSHIP AGREEMENT | 1 | Buff |
| M | MEDICAL FORM - BIRTH RECORDS | 1 | Goldenrod |
| N | INSERTING PAPER TAPE FOR TEN-KEY ADDING MACHINE | 1 | Canary |
| O | BANK-RELATED TASK SIMULATIONS | 3 | Gray |

| Section | Title | Number of Tasks | Color Code |
|---|---|---|---|
| P | ACCOUNTING SIMULATIONS | 7 | Pink |
| Q | ROLE PLAYING | 1 | Cherry |
| R | CASE PROBLEMS AND STUDIES | 15 | Ivory |
| S | IN-BASKET PROBLEMS | 4 | Blue |

# CLERK-TYPIST SIMULATION

Task: To learn the correct method of folding and inserting a letter in a large envelope and a small envelope.

Steps:

1. Study the diagram for folding a letter for a small envelope.
2. Using the letterhead provided, fold according to diagram.
3. Insert in small envelope as shown in step 4.
4. Study diagram for folding a letter for a large envelope.
5. Fold letterhead as directed for a large envelope.
6. Insert letter in large envelope.

## Guides for Addressing Envelopes

Spacing: Double space a three line envelope address. Single-space an address of four or more lines.

Style: Most envelope addresses are typed in the block style without end-of-line punctuation, except for the period when an abbreviation is used.

Notations: Postal directions (such as AIRMAIL, SPECIAL DELIVERY, etc.) are typed in capitals immediately below the space required for the stamp. Addressee instruction (Hold for arrival, Please Forward, Personal, etc.) are typed in the lower left corner of the envelope.

Personal Titles: Always use an appropriate personal title on a letter, envelope, or card addressed to an individual. When a woman's marital status is not known, use Miss or Ms. as the personal title.

Placement: Addressee's name and address begin on line 12, 2 inches from left edge of a card or small envelope; or on line 14, 4 inches from left edge of large envelope. Learn to use "eye measurement" so that you can twirl envelopes into the typewriter and type them without hesitation.

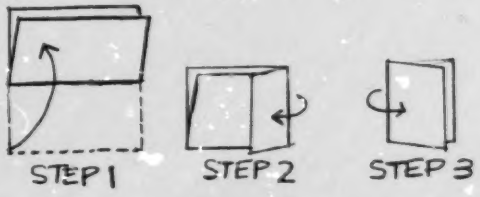
## Folding a Letter for a Small Envelope

Step 1. With the letter face up on the desk, fold from the bottom up to ½ inch of the top.

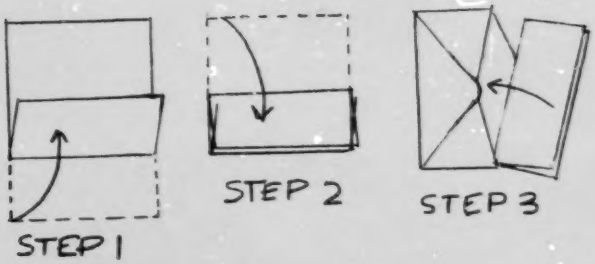
Step 2. Fold right third to left.

Step 3. Folding from left to right, fold left third to ½ inch of last crease.

Step 4. Insert last crease edge first.



## Folding a Letter for a Large Envelope




Step 1. With the letter face up on the desk, fold slightly less than one third of the letterhead up toward the top.

Step 2. Fold down the top of the letterhead to within ½ inch of the bottom fold.

Step 3. Insert the letter into the envelope with the last crease toward the bottom of the envelope and with the last fold up.

TASK-SIMULATION

Task: Folding a letter and placing it in the envelope.

Equipment and Supplies Needed: Letter.

Procedures:

1. With the letter face up on the desk, fold slightly less than one third of the letterhead up toward the top.
2. Fold down the top of the letter to within ½ inch of the bottom fold.
3. Insert the letter into the envelope with the last crease toward the bottom of the envelope and with the last fold up.

(A-2)

33 West 33rd Street PORTLAND DUPLICATOR New York, NY 10003

July 11, 1974

Mr. Thomas J. Simmons
Martin Miller & Sons
58 Broad Street
Atlanta, Georgia 30303

Dear Mr. Simmons:

Thank you for your letter about the unsatisfactory service that you are getting from your Portland Duplicator. I am deeply concerned about the situation and am asking our Atlanta dealer, Mr. Gordan, to see you about it.

This latest breakdown is the fifth you have had with as many machines, isn't it? How annoying it must be to you! We are, naturally, disturbed about this record; we have had a few machines get out of order before, but we have never had so many collapse in one installation. Most of our customers have never had even one service call, let alone any need for the replacement of our equipment. Moreover, no other installation has ever had the drum of the duplicator "run backwards", as you said was the case this time.

I am writing to Mr. Gordan, giving him full authority to settle the matter. Your friends in this company appreciate your patience.

Cordially yours,

Theodore Wilson
Sales Manager

pam
cc: Mr. Gordan

TASK-SIMULATION

Name _____

Date _____

Task: To fold a business letter and insert it into a business envelope properly.

Task Setting: The student learns to fold a business letter and insert it properly into the envelope in a junior high type writing class.

Materials: 1 sample task
1 business letter
1 business envelope

Procedure:

1. Open packet one in your kit and notice how the business letter has been inserted into the envelope.
2. Remove the sample business letter from the envelope and examine it as you unfold the letter.
3. Refold the sample letter and reinsert it properly into the envelope labeled packet one.
4. Using the business letter found in this kit, place it face up.
5. Fold approximately one-third of the letterhead toward the top, creasing gently.
6. Fold down the top of the letterhead, leaving approximately one-fourth inch margin at the bottom fold; crease gently.
7. Insert the letter into the envelope with the last crease toward the bottom of the envelope.
8. Briefly comment on this task on the back of the instruction sheet.
9. Place all materials in the kit and return them to the instructor.

(A-3)

P A R A M O U N T  P E N  C O M P A N Y

8469 Wilshire Boulevard
Los Angles, California 90048

213-272-2449

July 17, 1974

Mr. Ed Joyner
4137 East Saginaw Way
Hartford, Connecticut 06101

Dear Mr. Joyner:

We are proud to announce that continued growth in the volume of our business has made it necessary for us to change to a new location. Our present building at 1410 West Maple is just too short on space to enable us to provide you with the services you have come to expect.

Our entire staff is sure you will find us able to serve you even better with our improved line of merchandise. We will still be the only dealer for Paramount Pens in this immediate area.

All of us have been working late these past two weeks in order to be prepared for opening day. There will be special gifts for everyone. We hope it will be convenient for you to stop by and join in the fun.

Cordially yours,

(Miss) Donnis Jeffries
General Manager

# OFFICE PRACTICE

Problem: Arrange correspondence (a two-page letter, carbon copies, and envelope) in the proper order and place on the employer's desk for his signature.

Assumptions: The student will have had typewriting.
The student will have prepared this letter and addressed the envelope.

Supplies Needed: Typed letter
Carbon copy of the letter
Addressed envelope

Procedure: Insert the finished letter and its carbon copies under the flap of the envelope in the following order:
First page of the finished letter
Page 2 of the finished letter
First page of the carbon copy
Page 2 of the carbon copy

Insert the letter and its carbon copies under the flap of the envelope (with the face of the envelope up) so that the top of all papers is under the flap.

Place the letter, its carbon copies, and envelope on the employer's desk.

(When the context of the letter is of a confidential nature, place the letter face downward or enclose it in a folder.)

DEPARTMENT OF COMMUNITY COLLEGES

EDUCATION BUILDING

RALEIGH, NC 27611

February 11, 1975

Mrs. Judy Harper
Dean of Instruction
Orange Community College
Orangetown, NC 27633

Dear Mrs. Harper:

The Teacher Training Institute for Governmental Accounting Course will be held from 1:00 p.m. - 5:00 p.m., Friday, February 21 and from 8:30 a.m. - 12:30 p.m., Saturday, February 22 at the Institute of Government in Chapel Hill. The primary purpose of this session is to acquaint instructors with the special requirements of municipal accounting and the contents of the Uniform Accounting System. We assume that participants in the session have had previous experience in teaching at least elementary accounting.

This course is designed to provide both the basic theoretical background and practical applications of local government accounting for persons presently employed by local government units in their finance operations. It will not only provide a better understanding of financial operations but will make these employees aware of the pitfalls inherent in failing to maintain accounting records properly.

The course is designed to be offered one day per week for eleven weeks as part of your institution's spring quarter. The text for the course was written especially for use in teaching the Uniform Accounting System and financed under a grant from the Appalachian Regional Commission. Additional supplementary material will be provided by the Local Government Commission.

Accommodations will be available at the Institute of Government on Friday night, February 21. These accommodations are double occupancy at a charge of $4.00 per person. Meals may be obtained at nearby restaurants. If you plan to stay at a local motel instead, you will need to make your own reservations.

Please forward this information to the instructor in your institution who will be teaching the course.

Thank you for your continued interest and support in offering the government accounting course at your institution.

Sincerely,

R. J. Overton
Coordinator of Business Programs

si

TASK-SIMULATION

Name KEY Estimated time _____

Date _____ Actual time _____

Additional Materials Needed: Sorter pencil

Task Setting: The mail clerk handling incoming mail in a mailroom.

Task: Handling incoming mail.

Assumptions: The student has had experience in classifying correspondence.

Steps:

1. Remove string used by post office in wrapping mail
2. Sort the following pieces of mail according to classifications:
   - A. Certified letters
   - B. Air Mail letters
   - C. Registered letters
   - D. Special Delivery letters
   - E. Business letters
   - F. Personal letters
3. Place the number that represents the amount of correspondence received opposite each type of correspondence.

| | | | |
|---|---|---|---|
| A. Certified letters | 1 | D. Special Delivery | 2 |
| B. Air Mail letters | 0 | E. Business letters | 1 |
| C. Registered letters | 1 | F. Personal letters | 2 |

4. Place in sorting racks to be distributed to proper persons.

Banner Carpet Company
129 Duane Street
New York, New York 10010

SPECIAL DELIVERY

Karastan Service Center

Post Office Box 130

Eden, North Carolina 27288

---

21

Frances B. McNeal
215 Gracie Street
Eden, North Carolina 27288

Mr. Paul Cunningham

Karastan Service Center

Eden, North Carolina 27288

(C-1)

PERSONAL

Frances B. McNeal
215 Gracie Street
Eden, North Carolina 27288

Mrs. Patricia Perkins
Sales Division
Karastan Service Center
Eden, North Carolina 27288

PERSONAL

---

Vartanian Carpet Incorporated
855 W. Northwest Highway
Palatine, Illinois 60067

22

Karastan Service Center

Post Office Box 130

Eden, North Carolina 27288

(C-1)

Barker Brothers
Post Office Box 6364
San Francisco, California 94109

REGISTERED
No.

Mrs. Janet Broadnax
Purchasing Department
Karastan Service Center
Eden, North Carolina 27288

---

Albany Custom Floors
57 Lexington Avenue
Portsmouth, Ohio 45662

SPECIAL DELIVERY

Karastan Service Center
Post Office Box 130
Eden, North Carolina 27288

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(C-1)

TASK-SIMULATION

Name _____

Date _____

Task Setting: Students are to complete the task assigned in a Typing class.

Task: Correct mistakes in the paragraph using proofreaders' marks; from rough draft copy type an acceptable one.

Supplies Needed: The following supplies are enclosed:

1. List of proofreaders' marks
2. A paragraph to be corrected
3. One sheet of typing paper
4. Correcto-type

Procedure:

1. Study briefly the list of proofreaders' marks and their meanings.
2. Preread the paragraph.
3. Correct the paragraph as necessary by using the appropriate proofreaders' marks.
4. Type an acceptable copy from the rough draft copy, correcting all typographical errors.
5. Proofread the acceptable copy before removing it from the typewriter.
6. Staple the rough draft copy to the acceptable one after completing the typing.
7. Briefly comment on the task using the back of the instruction sheet.
8. Place your completed work and remaining materials in the kit and return them to the instructor.

PROOFREADERS' MARKS

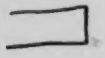
Delete

Transpose

Capitalize

Add Space

Insert



Move to Right

Close Up

Paragraph

CAMERA Fun

most pictures of people and objects should bee taken closer than they are? Move in close untill your subject fells the view-finder Look for the best angel; avoid alot of clutter in the back ground. One theother hand, you may shot from a high angel using the grass grass a s a back ground. Take thetime too walk a round your subject, looking high and low the for best picture. For distant scenes, such as a lake mountain, field, or valley, indlud some thing in the foreground togive you picture depth. A tree branch, or a archway, our good for this prupose. they help frame your pictures:

KEY

CAMERA Fun

most pictures of people and objects should bee taken closer than they are. Move in close until your subject fells the view-finder. Look for the best angel; avoid alot of clutter in the back ground. One theother hand, you may shot from a high angel using the grass a s a back ground. Take thetime too walk a round your subject, looking high and low the for best picture. For distant scenes, such as a lake mountain, field, or valley, includ some thing in the foreground togive you picture depth. A tree branch, or a archway, our good for this purpose. they help frame your pictures.

CAMERA FUN

Most pictures of people and objects should be taken closer than they are. Move in close until your subject fills the view-finder. Look for the best angle; avoid a lot of clutter in the background. On the other hand, you may shoot from a high angle using the grass as a background. Take the time to walk around your subject, looking high and low for the best picture. For distant scenes, such a a lake, mountain, field, or valley, include something in the foreground to give your picture depth. A tree branch, or an archway, are good for this purpose. They help frame your picture.

TASK-SIMULATION

Name _____ Estimated Time _____

Date _____ Actual Time _____

Additional Materials Needed: Letterhead, onionskin, carbon paper, envelope

Task Setting: A clerk-typist in the Office Services Division of a large business firm types a letter following the instructions on a Typing Request Form.

Task: Types a letter from rough-draft copy.

Step: I need this letter typed. Check the Typing Request Form for instructions.

TYPING REQUEST FORM

To: Office Services Division

From: Margaret L. Garrett
Group Special Division

Date: Sept. 16, 1974

Typing Instructions:

( ) Bond Paper + ___ Copy (Copies)

( ) All Bond Paper _____

( ✓ ) Letterhead + 1 Copy (Copies)

( ✓ ) Envelope(s)

( ) Memo Form

( ✓ ) Outgoing Mail

( ) Return to my desk

Special Instructions: Blockstyle, mixed punctuation. Sign my name and initial the signature. Return cc to my desk.

September 16, 1974

Mrs. Belle Horwitz
Alamo Savings Association
825 East Alamo
Pasadena, TX 77502

Dear Mrs. Horwitz:
Group Special Policy 98657

Your notice to cancel the insurance for H. Marino, Jr., effective July 30, was received last month

Because the cancellation date was after the 29th of the month, the cancellation will be reflected in the correct bill of September 29. Please pay the September bill as rendered.

Cordially,

Mrs. Margaret L. Garrett
Group Special Division

(D-2)

KEY

September 16, 1974

Mrs. Belle Horwitz
Alamo Savings Association
825 East Alamo
Pasadena, TX 77502

Dear Mrs. Horwitz:

Group Special Policy 98657

Your notice to cancel the insurance for H. Marino, Jr., effective July 30, was received last month.

Because the cancellation date was after the 29th of the month, the cancellation will be reflected in the correct bill of September 29. Please pay the September bill as rendered.

Cordially,

Mrs. Margaret L. Garrett

Mrs. Margaret L. Garrett
Group Special Division

coh

## TASK SIMULATION

A letter you typed this morning is returned to your desk. Your boss indicates that he made a few changes and discovered some errors! He has asked you to proofread your first letter <u>again</u> and retype it immediately for his signature.

Materials Needed: Typing paper, carbon paper, second sheet, and dictionary.

# TERMINIX INSPECTION REPORT AND TERMIGRAPH

Report No. _____

Licensee of
**E. L. BRUCE CO.**
Memphis, Tenn.

Name John Logan
Address 709 Revere Drive
Greensboro, NC 27401
Owner Same
Address _____

Date of Inspection 5/22/74
Use of Building Residence
Age of Building 2 years
Suggested by _____
Occupant's Home Phone _____ Bus. _____
Owner's Home Phone _____ Bus. _____

## CONSTRUCTION INFORMATION

**(Please Underscore Type of Structure** Frame—(Weatherboard, Shingle-Side, Stucco, Clapboard)—Brick Veneer—Solid Brick—Stone—Concrete Block—Solid Concrete—Stone Veneer.

Solid Foundation Wall—Type cement
Open (Pillars) — Type _____ Skirting _____
Veneer—Type _____ (to Ground) (to top Foundation)
Exterior Siding Proximity to Ground 12"
Center Bearing Walls—Type _____ Pillars—Type _____
Porches (Not Dirt-filled) No. 1 Surface wood
Dirt-filled Porches, Terraces, & Sun Parlors,
No. _____ Thickness _____ Surface _____
Sidewalks & Driveways to Drill _____ Lin. Ft. _____
Wood Supports to Service _____ To Treat _____
Wood Steps to Service _____ To Treat _____
Windows & Doors to Service _____ To Treat _____
Basement Floor — Type _____
Basement Ceilings — Type _____ Lin. Ft. _____
Basement Walls — Type _____
Basement Partitions — Type _____ Lin. Ft. _____
Fireplaces — No. _____ Type _____ Sq. Ft. _____
Is Working Clearance Ample? _____
Unexcavated Square Feet (Number) _____
Debris to be Removed _____ Estimated Cu. Yds. _____
Excavating _____ Estimated Cu. Yds. _____
Form Boards to be (Removed) (Treated) _____ Lin. Ft. _____
Stumps to be (Removed) (Treated), No. _____
Ventilators to be Installed _____ Type _____
Storage To Move _____
Soil Texture sandy
Type Heating electric
Moisture Condition _____
Repairs and Replacements _____
Access Doors to Cut, No. _____ Size _____
Misc. _____

Peculiar Conditions _____

Remarks _____

## LOCATION OF TERMITE INFESTATION

**Terminology:** Ruined, Badly Eaten, Infested, or No Visible Evidence.

Front [Sill] [Plate] [Wall] no visible evidence
Rear [Sill] [Plate] [Wall] nve
_____ Side [Sill] [Plate] [Wall] _____
_____ Side [Sill] [Plate] [Wall] _____
Main Center [(Beam) (Solid) (Laminated)] [Wall] nve
_____ Side Center [Beam(s) (Solid) (Laminated)] [Wall(s)] _____
Main Cross [Beam(s) (Solid) (Laminated)] [Wall(s)] nve
_____ Side Cross [Beam(s) (Solid) (Laminated)] [Wall(s)] _____
Wood Joists nve
Wood Headers _____
Fireplace Understructure _____
Dirt Fills nve
Form Boards nve
Wood Supports nve
Studding nve
Sub-flooring nve
Finish-flooring nve
Wood Steps—Carriages nve
Basement Partitions _____
Stored Materials _____
(Bins) (Closets) _____
Basement Floor nve
Windows & Doors nve
Interior Trim nve
Exterior Woodwork nve

Active Shelter Tubes _____
Ground Infestation _____
"Swarmers" _____
Misc. _____
Remarks _____
SALESMAN _____
INSPECTOR BAG

Key B 2-a

(D-3)

July 10, 1974

Mr. John Logan
709 Revere Drive
Greensboro, NC 27401

Dear Mr. Logan:

A recent termite inspection of several houses in the Hamilton Homes area revealed some conditions around the outside of the houses that are condusive to the spread of termites.

At the base of some of the houses, dirt has been pushed up so that it partially covers the foundation beam and siding material. Such places allow termites to enter beneath the dirt cover. If such a condition was found around the house you occupy, you will find a notation to that affect on the ~~attached~~ enclosed sheet. May we request that such dirt be cleared away as soon as possible.

is this the proper word?

All woody-root shrubs should be at least 2 inches from the base of the house to eliminate termite infestation.

If we are to reduce termite activity, your cooperation will be necessary. May we count on your help.

Sincerely,

Stew Barborn
General Manager

bs

(D-3)

KEY

July 10, 1974

Mr. John Logan
709 Revere Drive
Greensboro, NC 27401

Dear Mr. Logan:

A recent termite inspection of several houses in the Hamilton Homes area revealed some conditions around the outside of the houses that are conducive to the spread of termites.

At the base of some of the houses, dirt has been pushed up so that it partially covers the foundation beam and siding material. Such places allow termites to enter beneath the dirt cover. If such a condition was found around the house you occupy, you will find a notation to that effect on the enclosed sheet. May we request that such dirt be cleared away as soon as possible.

All woody-root shrubs should be at least 2 inches from the base of the house to eliminate termite infestation.

If we are to reduce termite activity, your cooperation will be necessary. May we count on your help.

Sincerely yours,

Stew Barborn
General Manager

bs

Enclosure

Envelope address

Mr. John Logan
709 Revere Drive
Greensboro, NC 27401

# TASK SIMULATION FOR TYPEWRITING

Task: Type a table from rough draft.

Steps:
1. Receive table in rough draft with instructions from employer.
2. Total the two columns.
3. Type the table, arranging it alphabetically as you type, in correct form.

Type this table in alphabetical order.

J.P.

Cecils Business College Enrollment
Winter Quarter 1974

| Course | Students | | |
|---|---|---|---|
| | male | Female | Total |
| Business English | 5 | 14 | |
| Vocabulary and Spelling | 7 | 11 | |
| Business machines | 2 | 7 | |
| Typewriting I | 2 | 22 | |
| Accounting I | 15 | 9 | |

KEY

CECILS BUSINESS COLLEGE ENROLLMENT

WINTER QUARTER 1974

| | Students | | |
|---|---|---|---|
| Course | Male | Female | Total |
| Accounting I | 15 | 9 | 24 |
| Business English | 5 | 14 | 19 |
| Business Machines | 2 | 7 | 9 |
| Typewriting I | 2 | 22 | 24 |
| Vocabulary and Spelling | 7 | 11 | 18 |

TASK-SIMULATION

Name _____ Estimated Time _____

Date _____ Actual Time _____

Typing a Letter
From a Carbon Sheet

Task: Your boss has asked you to type a letter using the attached carbon copy as your guide. Make the necessary corrections as indicated on the sheet in ink.

Assumption: The student can type and proofread correctly.

Supplies Needed:
Letterhead paper
Carbon paper
Onionskin paper
Correction tape
Envelope

Procedures:
1. Receives rough draft of carbon copy to be typed from, and a card with a name and address.
2. Types an original and one carbon copy of letter.
3. Proofreads letter before taking out of typewriter.
4. Types envelope.
5. Gives to boss for signature.
6. Picks up from boss after signing and folds for mailing.
7. Staples the carbon copy and the rough draft together and inserts into proper file.

(D-5)

Matthews, Nicholas J.

Mr. Nicholas J. Matthews
1440 Courtland Drive
Bethesda, Maryland 40085

~~July 31, 1973~~

send to mr. matthews - card attached

Mr. ~~James~~ W. Little
908 Snake Boulevard
~~Greensboro, NC 27412~~

Dear ~~Jim.~~

It was a pleasure to see you on my recent trip to ~~Greensboro~~. I was glad to see a ~~familiar face~~ at the airport and appreciated your meeting me and taking me to the ~~UNC-G campus.~~ Statler-Hilton Hotel.

I ~~felt~~ enjoyed our discussion ~~was very helpful to me~~ and came away with all sorts of ideas ~~and resolutions~~.

Thank you for helping make the ~~Greensboro~~ trip a pleasant one. I look forward to seeing you again ~~at the spring conference in Dallas~~.

Sincerely yours,

Miss Patsy Cherry

jaj

(D-5)

KEY

July 17, 1974

Mr. Nicholas J. Matthews
1400 Courtland Drive
Bethesda, Maryland 40085

Dear Mr. Matthews:

It was a pleasure to see you on my recent trip to Washington. I was glad to see you at the National airport and appreciated your meeting me and taking me to the Statler-Hilton Hotel.

I enjoyed our discussion and came away with all sorts of ideas.

Thank you for helping make the Washington trip a pleasant one. I look forward to seeing you again.

Sincerely yours,

Miss Patsy Cherry

did

TASK-SIMULATION

Task: To type a memorandum from rough draft and to prepare a request for duplicating services.

Background: You are the secretary to the president of Guilford Corporation, Mr. I. B. Sterns. On May 20 you typed a memorandum in rough draft form which is to be released on June 1. Today, May 27, you returned from lunch and found that Mr. Sterns had placed the edited memorandum on your desk for retyping.

Equipment and Supplies Needed: Typewriter
Interoffice memorandum
Request for Duplicating Service form

Procedures:

1. Using the edited rough draft, prepare one copy of the memorandum for Mr. Sterns' signature.

2. Prepare the Request for Duplicating Service form so that you will be ready to send the memorandum to the Duplicating Department after Mr. Sterns has signed it. You will need the 30 copies by May 29 and would like them returned to you in Mr. Sterns' office.

ROUGH DRAFT

type for me to sign. then you can send the letter down to DUP. 30 copies (D-6) (offset)

SPS

To: All Division and Department Heads

From: I. B. Sterns, President/slj

Date: June 1, 1974

Subject: Central Purchasing

Effective July 1, a central purchasing office will be established ~~under~~ within the Administrative Division. It will be the responsibility of this office ~~will~~ to purchase all common supplies and equipment used by all divisions and departments.

Requests for supplies and equipment should be submitted to the Administrative Division on a purchase requisition at least ~~30~~ 90 days prior to the date desired. The requisition should include a detailed description of the goods, the quantity to be ordered and the delivery desired date. The requisition should include also the name and address of a firm from which the goods may be purchased, the catalog number, and the price of each item, if this information is known. Purchases will be made, however, from the ~~dealer~~ supplier with the lowest cost for items of comparable quality. The purchase requisition will be signed by the appropriate division head or his authorized representative. A supply of purchase requisition forms ~~can be~~ may be obtained from the Administrative Division.

Emergency purchases ~~needed before 60~~ required within a period of less than 90 days should be ~~sent~~ submitted to this office for approval with a complete justification for the emergency action.

The establishment of a central purchasing office in no way affects the authority of the various divisions to purchase items for resale.

(D-6)

KEY

INTEROFFICE MEMORANDUM

TO: All Division and Department Heads DATE: June 1, 1974

FROM: I. B. Sterns, President/slj SUBJECT: Central Purchasing

Effective July 1, a central purchasing office will be established within the Administrative Division. It will be the responsibility of this office to purchase all common supplies and equipment used by all divisions and departments.

Requests for supplies and equipment should be submitted to the Administrative Division on a purchase requisition at least 90 days prior to the date desired. The requisition should include detailed description of the goods, the quantity to be ordered, and the desired delivery date. The requisition should include also the name and address of a firm from which the goods may be purchased, the catalog number, and the price of each item, if this information is known. Puchases will be made, however, from the supplier with the lowest cost for items of comparable quality. The purchase requisition will be signed by the appropriate division head or his authorized representative. A supply of purchase requisition forms may be obtained from the Administrative Division.

Emergency purchases required within a period of less than 90 days should be submitted to this office for approval with a complete justification for the emergency action.

The establishment of a central purchasing office in no way affects the authority of the various divisions to purchase items for resale.

(D-6)

KEY

REQUEST FOR DUPLICATING SERVICE

Department Requesting Service: Mr. Stern's Office

Date Sent: 5/27/74 Date Needed: 5/29/74

Return to: Student's Name (Name) Mr. Stern's (Department)

Type of service desired:

| | Number |
|---|---|
| Photocopy (1-10 copies) | |
| Stencil (over 10 copies) | |
| Offset (over 10 copies) | 30 |
| Two-hole punch | |
| Three-hole punch | |
| Collating | |
| Master copy to be returned | |
| Other | |

# CORRECTING A SEVERANCE LIST

Task: To retype, correct, and alphabetize by date a severance list.

Supplies and Equipment Needed: Typewriter
Severance List
Typing paper

Steps:
1. Select the names for severance on 7/2.
2. Alphabetize the 7/2 names.
3. Select the names for severance on 7/7.
4. Alphabetize the 7/7 names.
5. Transpose names so that the last name is typed first.
6. Make corrections and retype the severance list with names transposed and alphabetized by date.

SEVERANCES--Week Ending July 19, 1974

| Name | Date | Location* | Reason |
|---|---|---|---|
| JESSICA TAMNY | 7/2 | Advertising | Maternity |
| LEA SMITH | 7/7 | Purchasing | Maternity |
| CAROL LEONARDO | 7/2 | Accounting | Maternity |
| NANETTE CALVIN | 7/7 | Personnel | Moving out of state |
| MELODY BASKIN | 7/7 | Payroll | Moving out of state |
| JANE DOTTS | 7/7 | Sales--San Francisco | Married (out of city) |
| ROBERTA TURNER | 7/2 | Traffic--Boston | Married (out of city) |
| FREDERICK KRAUCH | 7/2 | Warehouse--Atlanta | Other employment |
| BETTY GUARINO | 7/7 | Legal | ~~Other employment~~ Retired |
| FAYE RIGSBY | 7/7 | Accounting | Retired |
| ANTHONY CAINE | 7/7 | Sales--~~Boston~~ Atlanta | ~~Retired~~ other employment |
| ~~CHERYL~~ Charles FLYNN | 7/7 | Advertising | Retired |
| JEANNE SIMONE | 7/7 | Executive | Moving abroad |
| GREGORY O'MALLEY | 7/2 | Sales | Moving (health) |
| STUART POLSTER | 7/2 | Sales--Seattle | Other employment |
| KENNETH ROSNER | 7/7 | Sales--Dallas | Retired |

*New York unless otherwise noted.

Rearrange this list so that the severances for 7/2 are listed at the top in alphabetic order by name. The 7/7 severances should then be listed alphabetically. Transpose names so that last names are typed first.

SEVERANCES--Week Ending July 19, 1974

| Name | Date | Location* | Reason |
|---|---|---|---|
| KRAUCH, FREDERICK | 7/2 | Warehouse--Atlanta | Other employment |
| LEONARDO, CAROL | 7/2 | Accounting | Maternity |
| O'MALLEY, GREGORY | 7/2 | Sales | Moving (health) |
| POLSTER, STUART | 7/2 | Sales--Seattle | Other employment |
| TAMNY, JESSICA | 7/2 | Advertising | Maternity |
| TURNER, ROBERTA | 7/2 | Traffic--Boston | Married (out of city) |
| BASKIN, MELODY | 7/7 | Payroll | Moving out of state |
| CAINE, ANTHONY | 7/7 | Sales--Atlanta | Other employment |
| CALVIN, NANETTE | 7/7 | Personnel | Moving out of state |
| DOTTS, JANE | 7/7 | Sales--San Francisco | Married (out of city) |
| FLYNN, CHARLES | 7/7 | Advertising | Retired |
| GUARINO, BETTY | 7/7 | Legal | Retired |
| RIGSBY, FAYE | 7/7 | Accounting | Retired |
| ROSNER, KENNETH | 7/7 | Sales--Dallas | Retired |
| SIMONE, JEANNE | 7/7 | Executive | Moving abroad |
| SMITH, LEA | 7/7 | Purchasing | Maternity |

*New York unless otherwise noted.

SIMULATION TASK

FOR STUDENTS IN TYPEWRITING II

Task: Type the originator's revisions on a completed letter.

Steps:
1. Originator returns typed letter with revisions; the typed envelope and enclosure are also returned.
2. Retype letter making necessary changes; make one carbon copy.
3. Return letter to originator (the teacher) for signature and approval.
4. Insert original with the enclosure into envelope.

(D-8)

ASHEBORO COMMERCIAL COLLEGE INC.

151 North Fayetteville Street
Asheboro, North Carolina 27203

625-4094 OR 629-9238

July 10, 1974

Mr. Owen Pearson
201 Edgewater Avenue
Fairview, WI 53719

Dear Mr. Pearson:

The regular meeting of the Board of Trustees will be held in the company Executive Suite on Monday, July 22, 1974, at 2 p.m. Change to the 23rd

The major item of discussion at the meeting will be the Planning Committee's report of the feasibility of locating a new plant in Easton, Wisconsin. A copy of the complete agenda will be mailed to you within the next week.

Sincerely yours,

Charles B. Harrington
President

fh

Insert
a preliminary report of the committee is enclosed for your study.

PRELIMINARY REPORT OF PLANNING COMMITTEE

1. LABOR. Easton is a "buyer's market" for industrial firms utilizing workers with relatively few skills.

2. POWER AND FUEL. Easton is located in an area in which power and fuel costs are "average". Electricity is the main source of power.

3. WATER. Because of its proximity to numerous small lakes, water supply is abundant and relatively cheap. This is one of the major advantages of locating in Easton.

4. TAXES. Tax concessions are made to new industries only after negotiations with local officials. Last year, city taxes on real property were 17 mills on 40% of the market value.

5. TRANSPORTATION. Easton is favorably situated with regard to national markets. The availability of excellent highways is a factor which favors plant location.

(D-8)

KEY

A S H E B O R O  C O M M E R C I A L  C O L L E G E  I N C .

151 North Fayetteville Street
Asheboro, North Carolina 27203

625-4094 OR 629-9238

July 10, 1974

Mr. Owen Pearson
201 Edgewater Avenue
Fairview, WI 53719

Dear Mr. Pearson:

The regular meeting of the Board of Trustees will be held in the company Executive Suite on Tuesday, July 23, 1974, at 2 p.m.

The major item of discussion at the meeting will be the Planning Committee's report of the feasibility of locating a new plant in Easton, Wisconsin. A preliminary report of the committee is enclosed for your study. A copy of the complete agenda will be mailed to you within the next week.

Sincerely yours,

Charles B. Harrington
President

fh

Enclosure

# TYPING FILING CARDS

Assumption: The student has learned to alphabetically index names of individuals.

Task: To type the names on the enclosed address list in transposed indexing order and in address order on file cards.

Equipment and Supplies Needed:
Address List
Typewriter
File Cards

Steps:

1. Three spaces from the left edge of the card and above the horizontal line type the surname of the individual (separate the surname from the first name with a comma), then the first name or initial, and finally the middle name or initial.

2. If the name contains a title or identifying element, this is to be typed in parantheses at the end of the name.

3. Three spaces from the edge of the card and a triple space below the name type the name and address in address order as given on the list.

4. Arrange the cards in alphabetical order.

ADDRESS LIST

Mr. A. Charles Williams
149 Carter Street
Richmond, Virginia 23208

Mr. William L. Brinker
121 Vine Street
Lomita, California 90717

Dr. Harold T. Clarke
1051 Meredith Drive
Cincinnati, Ohio 45212

Mr. Gerhard Van Der Meer
13 Central Avenue
Chicago, Illinois 60634

SOLUTION

1. Brinker, William L.
2. Clarke, Harold T. (Dr.)
3. Van Der Meer, Gerhard
4. Williams, A. Charles

# TASK SIMULATION

Your teacher wants the following instructional materials which must be requested on a requisition form:

20 copies of 20,000 Words
20 copies of The Secretary on the Job and a copy of the Instructor's Manual and Key
20 copies of Reference Manual for Stenographers & Typists--soft cover

You have been asked to do the following:

1. Find the school price for each of the listed items in the current Gregg Catalog.

2. Figure the extensions--the total amount for each item and then the total of all items.

3. Type the requisition. Use "copy" as the unit, and be sure to include the code number as part of the description.

Materials Needed: Gregg Catalog
Requisition set and/or copies of the form and carbon paper
Adding machine or calculator--OPTIONAL

# PURCHASE REQUEST

(F-1)

PREPARE THIS FORM IN DUPLICATE--RETAIN ONE FOR REFERENCE.

TO: PURCHASING OFFICE, ROOM 48

DATE:

FROM: _____

BUDGET CODE: _____

DIVISION: _____

_____ PUBLIC INSTRUCTION
_____ COMMUNITY COLLEGES
_____ CONTROLLER'S OFFICE

DELIVER TO: _____

ROOM NO. & BLDG.: _____

RECOMMENDED VENDOR:

DESIRED DELIVERY DATE:

| QUANTITY | CATALOG NO. | DESCRIPTION | UNIT PRICE | TOTAL |
|---|---|---|---|---|
| | | | | |
| | | | TOTAL | |

APPROVED BY:

(Director/Program Supervisor)*

AVAILABILITY OF FUNDS CERTIFIED BY:

(Accountant Supervisor)

*The Purchasing Office will secure certification of funds from Accountant Supervisor.

# PURCHASE REQUEST

PREPARE THIS FORM IN DUPLICATE--RETAIN ONE FOR REFERENCE.

TO: PURCHASING OFFICE, ROOM 48 (F-1)

KEY

DATE: July 17, 1974

FROM: RJO

BUDGET CODE: 33

DIVISION: Program Development

DELIVER TO: Program Development

_____ PUBLIC INSTRUCTION
_X_ COMMUNITY COLLEGES
_____ CONTROLLER'S OFFICE

ROOM NO. & BLDG.: 454 Education

RECOMMENDED VENDOR: Gregg

DESIRED DELIVERY DATE: August 3, 1974

| QUANTITY | CATALOG NO. | DESCRIPTION | UNIT PRICE | TOTAL |
|---|---|---|---|---|
| 20 copies | 07-037337-X | 20,000 WORDS, Spelled and Divided for Quick Reference, Sixth Edition (1971) Leslie | 1.80 | 36.00 |
| 20 copies | 07-023068-4 | REFERENCE MANUAL FOR STENOGRAPHERS AND TYPISTS, Fourth Edition (1970) Gavin and Sabin | 2.34 | 46.80 |
| 20 sets | 07-071180-1 | THE SECRETARY ON THE JOB: A Practice Set for Secretarial Students (1967) Witherow | 3.36 | 67.20 |
| 1 copy | 07-071181-X | Instructor's Manual and Key for THE SECRETARY ON THE JOB | 1.60 | 1.60 |
| | | | TOTAL | 151.60 |

APPROVED BY:

(Director/Program Supervisor)*

AVAILABILITY OF FUNDS CERTIFIED BY:

(Accountant Supervisor)

*The Purchasing Office will secure certification of funds from Accountant Supervisor.

TASK-SIMULATION

Name _____ Estimated Time _____

Date _____ Actual Time _____

Materials Needed: Puchase Order; Invoice

Summary: Task Background: This is a small business with a two-girl office. A purchase order has been filled with supplies that are in stock. An invoice is to be typed for items that were sent. The prices are always checked by the boss.

Task: Types invoice with carbon copy from rough draft of purchase order.

Steps:
1. Receives rough draft copy of purchase order.
2. Uses short carbon sheet and invoice forms (in folder).
3. Types original and one carbon copy.
4. Proofreads while still in typewriter.
5. Makes neat erasures (if necessary).
6. Places on the desk of the boss for confirmation.
7. Files the carbon copy after approval.
8. Places carbon sheet in desk drawer.

Evaluation: The invoice must be neat, correct, and mailable.

(G-1)

Form No 6

STATE OF NORTH CAROLINA
DEPARTMENT OF
**PUBLIC EDUCATION**
RALEIGH, N. C.

**PURCHASE ORDER**

BUDGET CODE

BOTH ABOVE NUMBERS MUST APPEAR ON ALL INVOICES, SHIPPING PAPERS AND SHIPMENTS. SEE REVERSE SIDE FOR ADDITIONAL INSTRUCTIONS.

DATE September 7, 19X1

Legerton & Company, Inc.
263 Wingate Street
Salem, State 53568

**BILLING INSTRUCTIONS**

Seperate invoices in quadruplicate must be rendered for each order or shipment. The title of the account must be exactly as shown under "Charge To". If nothing appears under "Charge To", charge as shown under "Ship To". All invoices and shipping papers should be mailed to Division of Departmental Services, 48 Education Building, Raleigh, N. C. 27611.

ALL APPLICABLE N. C. SALES & USE TAX SHALL BE SHOWN AS A SEPARATE ITEM ON INVOICE.

PLEASE ENTER OUR ORDER AS FOLLOWS:

SHIP TO Dept. of Public Education
Education Building
Raleigh, NC 27611

CHARGE TO: PURCHASING OFFICER
DEPARTMENT OF PUBLIC EDUCATION
EDUCATION BUILDING
RALEIGH, N. C. 27611

SHIP VIA REA Express

F.O.B.
DELIVERY
TERMS

**IMPORTANT**

FOUR COPIES OF INVOICE REQUIRED. MUST BE MAILED DIRECTLY TO "DIVISION OF DEPARTMENTAL SERVICES" ON DATE SHIPMENT IS MADE.

| QUANTITY | DESCRIPTION | PRICE | AMOUNT |
|---|---|---|---|
| 1 | Desk, Executive, Walnut, 30x60 | | 190.00 |
| 1 | Chair, Executive, Swivel, with arms | | 75.00 |
| 1 | Desk, Secretarial, Walnut, 30x60 | | 155.00 |
| 1 | Chair, Secretarial Posture | | 60.00 |
| 4 | Chairs, Side-arm | 32.50 | 130.00 |
| | | | 610.00 |

DIVISION OF DEPARTMENTAL SERVICES

Jane Starr

PURCHASING OFFICER

(G-1)

KEY

Trans. 12

# *Legerton & Company, Inc.*

263 Wingate Street
SALEM, STATE
53986

SOLD TO . State of North Carolina
Department of Public Education
Raleigh, North Carolina 27611

INVOICE NO. 436
October 1, 19X1
Terms: 2/10, n/30

| QUANTITY | DESCRIPTION | UNIT PRICE | AMOUNT | |
|---|---|---|---|---|
| 1 | Desk, Executive, walmut, 30 x 60 | | 190 | 00 |
| 1 | Chair, Executive, swivel, w/arms | | 75 | 00 |
| 1 | Desk, Secretarial, walnut, 30 x 60 | | 155 | 00 |
| 1 | Chair, Secretarial posture | | 60 | 00 |
| 4 | Chairs, Side-arm | $32.50 | 130 | 00 |
| | | | $610 | 00 |
| | State Sales Tax | | 18 | 30 |
| | Total | | $628 | 30 |

APPROVED: A. J. 10/3/X1
PRICES O.K.: A. J.
EXTENSIONS O.K.:
ACCOUNT No.:
DATE PAID:
CHECK No.:

## TASK SIMULATION #1

Task: Type a model copy of a form letter

Steps:

1. Receive form letter.
2. Arrange model copy allowing space for date, inside address, and salutation.
3. Type model copy.
4. Proofread model copy for errors.
5. Make necessary corrections on model copy.

I've waited until now to write because we wanted not only to spare you the onus of a series of advance notices, but also to introduce a renewal plan especially tailored to the needs and desires of our subscribers.

> By special arrangement, we're making it possible for you to RENEW your subscription to SPORTS ILLUSTRATED for any length of time you choose -- at only 18¢ a week. That's 22% lower than our regular rate.

Clearly we have to put some limits at both ends of your options. But the range is still quite broad. You may renew SI at this attractive rate for any number of issues between 40 (the lower limit) and 156 (the maximum we can offer).

I think you'll agree, you won't find a better bargain anywhere. Or by the same token a better time to keep SPORTS ILLUSTRATED coming your way. Just fill in the number of weeks you'd like to receive SI on the enclosed form and we'll bill you for the proper amount later. Naturally, your new subscription won't begin until your current one completely runs out.

Cordially,

Bruce A. Barnet
Circulation Director

BAB:

Enclosure

(H-1)

KEY

(Date)

Inside Address

Salutation:

I've waited until now to write because we wanted not only to spare you the onus of a series of advance notices, but also to introduce a renewal plan especially tailored to the needs and desires of our subscribers.

> By special arrangement, we're making it possible for you to RENEW your subscription to SPORTS ILLUSTRATED for any length of time you choose -- at only 18¢ a week. That's 22% lower than our regular rate.

Clearly we have to put some limits at both ends of your options. But the range is still quite broad. You may renew SI at this attractive rate for any number of issues between 40 (the lower limit) and 156 (the maximum we can offer).

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Cordially,

Bruce A. Barnet
Circulation Director

BAB:

Enclosure

## TASK SIMULATION #2

Task: Make Thermo-Master from model copy of form letter typed in task simulation number one, and duplicate twenty-five copies.

Materials Needed: Thermo-Master

Steps:
1. Receive model copy of form letter.
2. Make Thermo-Master of model copy.
3. Duplicate form letter in 25 copies using thermo-master.

I've waited until now to write because we wanted not only to spare you the onus of a series of advance notices, but also to introduce a renewal plan especially tailored to the needs and desires of our subscribers.

> By special arrangement, we're making it possible for you to RENEW your subscription to SPORTS ILLUSTRATED for any length of time you choose--at only 18¢ a week. That's 22% lower than our regular rate.

Clearly we have to put some limits at both ends of your options. But the range is still quite broad. You may renew SI at this attractive rate for any number of issues between 40 (the lower limit) and 156 (the maximum we can offer).

I think you'll agree, you won't find a better bargain anywhere. Or by the same token a better time to keep SPORTS ILLUSTRATED coming your way. Just fill in the number of weeks you'd like to receive SI on the enclosed form and we'll bill you for the proper amount later. Naturally, your new subscription won't begin until your current one completely runs out.

Cordially,

Bruce A. Barnet
Circulation Director

BAB: slj

Enclosure

TASK-SIMULATION

Name _____ Estimated Time _____

Date _____ Actual Time _____

Task Setting: This is a business machine supply warehouse. There are five offices with a total of twenty secretaries and clerks. The need is great for the two-letter abbreviations for states because of the heavy communication flow.

Background Information: The pupil has been exposed to typing master units and making corrections when needed. She has had several activities in centering vertically and horizontally.

Task: Type a master unit for 2-letter abbreviations for state, district, and territory names (for later distribution).

Steps:
1. Receives copy of 2-letter abbreviations for state, district, and territory names from the teacher.
2. Gets supplies (master unit, eraser, paper clip).
3. Removes inner insert from master unit and inserts master unit in the typewriter.
4. Centers heading one inch from top, using two lines.
5. Determines longest line to be centered horizontally; leaving seven spaces between columns.
6. Sets left margin stop and one tab stop.
7. Types activity.
8. Proofreads and corrects errors (if any).
9. Returns to duplication basket.

Evaluation: The master unit must be typed with 100% accuracy in the 2-letter abbreviation for state, district and territory names; and must be neat on the reproduction side.

TWO-LETTER ABBREVIATIONS
FOR STATE, DISTRICT AND TERRITORY NAMES

(H-3)

KEY

| | |
|---|---|
| Alabama | AL |
| Alaska | AK |
| Arizona | AZ |
| Arkansas | AR |
| California | CA |
| Canal Zone | CZ |
| Colorado | CO |
| Connecticut | CT |
| Delaware | DE |
| District of Columbia | DC |
| Florida | FL |
| Georgia | GA |
| Guam | GU |
| Hawaii | HI |
| Idaho | ID |
| Illinois | IL |
| Indiana | IN |
| Iowa | IA |
| Kansas | KS |
| Kentucky | KY |
| Louisiana | LA |
| Maine | ME |
| Maryland | MD |
| Massachusetts | MA |
| Michigan | MI |
| Minnesota | MN |
| Mississippi | MS |
| Missouri | MO |
| Montana | MT |
| Nebraska | NE |
| Nevada | NV |
| New Hampshire | NH |
| New Jersey | NJ |
| New Mexico | NM |
| New York | NY |
| North Carolina | NC |
| North Dakota | ND |
| Ohio | OH |
| Oklahoma | OK |
| Oregon | OR |
| Pennsylvania | PA |
| Puerto Rico | PR |
| Rhode Island | RI |
| South Carolina | SC |
| South Dakota | SD |
| Tennessee | TN |
| Texas | TX |
| Utah | UT |
| Vermont | VT |
| Virgin Islands | VI |
| Virginia | VA |
| Washington | WA |
| West Virginia | WV |
| Wisconsin | WI |
| Wyoming | WY |

# TYPEWRITING II SIMULATION

Task: Student types a handwritten letter on a mimeograph stencil.

Supplies: Mimeograph stencil
Correction fluid

Equipment: Typewriter

Assumptions: The student will have had:

1. Some practice in typing from handwritten copy.
2. Some experience in typing on mimeograph stencils.
3. Training in typing various kinds of business letters.
4. Experience with proofreading techniques.

Directions: The student will:

1. Correct any spelling or punctuation errors found on the handwritten copy.
2. Type the letter using an appropriate letter form, and leave adequate space for the current date and inside address.
3. Proofread and correct all errors before removing the stencil from the typewriter.

(H-4)

Southern Bank
Midtown Mississippi
02110

Dear

May we express our appreciation to you for the loan you made with our bank recently. We are proud to have you as a customer. You will find all of the services of our bank available upon request.

Thank you again for your business. Please call us when we can serve you.

Sincerely,
Richard C. Ball
Loan Officer

(H-4)

KEY

Southern Bank
Midtown, Mississippi 02110

Dear

May we express our appreciation to you for the loan you made with our bank recently. We are proud to have you as a customer. You will find all of the services of our bank available upon request.

Thank you again for your business. Please call on us when we can serve you.

Sincerely,

Richard C. Ball
Loan Officer

els

## SIMULATION

Task: Student runs off letter typed on mimeograph stencil, and fills in required information.

Supplies and Equipment: Mimeograph machine
Typewriter
Mimeograph paper
Typewriting eraser

Assumptions: The student will have had:

1. Practice using the mimeograph machine.
2. Some experience typing on form letters.
3. Experience with proofreading techniques.

Instructions: The student will:

1. Operate mimeograph machine using correct technique.
2. Mimeograph ten letters.
3. Type the current date, address, and salutation in the correct places.

(H-5)

KEY

Southern Bank
Midtown, Mississippi 02110
July 17, 1974

Mr. John L. Smith
226 West Page Street
Midtown, Mississippi 02110

Dear Mr. Smith:

May we express our appreciation to you for the loan you made with our bank recently. We are proud to have you as a customer. You will find all of the services of our bank available upon request.

Thank you again for your business. Please call on us when we can serve you.

Sincerely,

Richard C. Ball
Loan Officer

els.

# THERMOFAX SIMULATION

Name _____ Estimated Time _____

Date _____ Actual Time _____

Background: The North Carolina Bankers Association is having its annual convention in your city. North Carolina National Bank is the host bank for this year's convention. Mr. William Hayes, your boss at NCNB, is making a presentation on consumer loans during the afternoon session.

To illustrate that commercial banks are the largest single source of consumer credit, Mr. Hayes has asked you to prepare a transparency of the attached pie graph to use in his presentation.

The Problem: The pie graph contains six (6) blanks that need to be filled in before making the transparency.

Equipment and Supplies Needed:
- Thermofax machine
- Transparency film
- Source Document: Pie Graph
- No. 2 pencil or black felt-tipped marking pen

Procedures:

1. Using a No. 2 pencil or felt-tipped marking pen,* fill in the blanks with the following information:

| | |
|---|---|
| Commercial Banks | 39.20% |
| Consumer Finance Companies | 8.56% |
| Credit Unions | 10.31% |
| Sales Finance Companies | 25.26% |
| Total Retail Outlets | 13.34% |
| Other Financial Institutions | 3.33% |

2. Place a sheet of transparency film over your original. Make certain that the notch on the film is in the upper right-hand corner.

3. Set the copier dial midway between the lighter setting and the darker setting (indicated by WHITE on the Secretary model thermofax machine).

*The infrared process requires that the information to be reproduced be drawn or written in a carbon-based lead or ink.

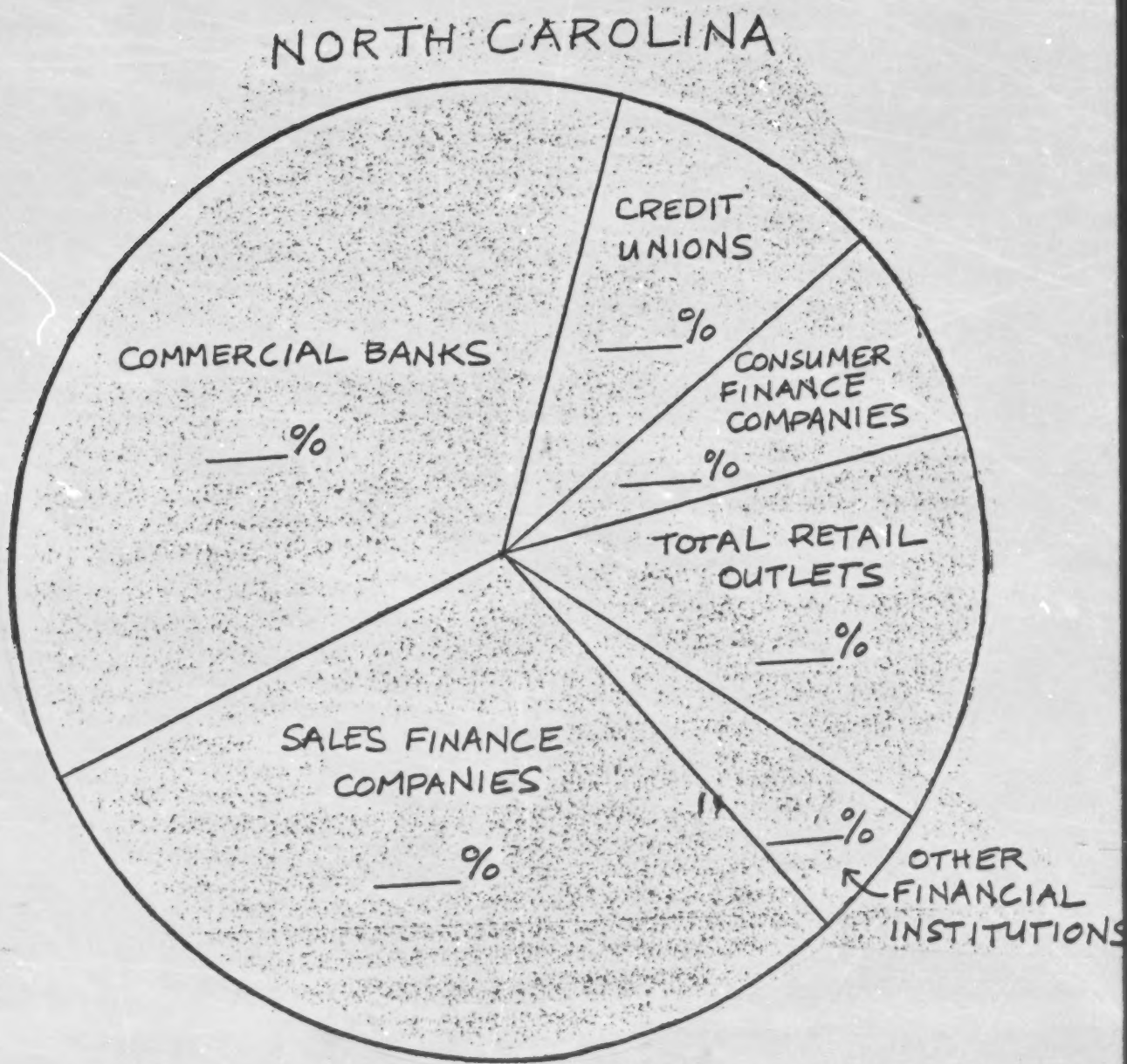
4. With the transparency film on top, pass the film and original copy through the copier, guided by the arrows printed on the feed table.

5. If the image is too light, move the copier dial to the next darker setting. If the image is too dark and letters run together, move the copier dial to the next lighter setting.

6. Present original and transparency to Mr. Hayes for approval.

(H-6)

# DISTRIBUTION OF INSTALLMENT LOANS BY HOLDER, 1974



# I TAKE A LOOK AT MYSELF

Objective: Upon completion of this personality quiz, the participant will be able through this self evaluation to build a more accurate understanding of himself. With this knowledge he will be able to choose a career more wisely, to look at some of his shortcomings and earnestly attempt to make adjustments where possible in order to have a more fulfilling life.

Evaluation: This personality quiz was designed for self-evaluation; therefore, no scale was developed for grading purposes. However, suggestions are given on each quiz for scoring the quiz or for having consultations with students.

# AN APPRAISAL OF MY APTITUDE*

Listed below are several areas of ability or aptitude. (Try not to confuse "interest" with aptitude. Interest means what you like or dislike. Aptitude means your capacity for success in a given area in which you receive training.) On the right are three degrees of ability. Consider each ability individually and check the degree you believe you possess.

| | Below Average | Average | Above Average |
|---|---|---|---|
| 1. Physical | | | |
| a. Strength | _____ | _____ | _____ |
| b. Coordination | _____ | _____ | _____ |
| 2. Manual dexterity | _____ | _____ | _____ |
| 3. Mechanical | _____ | _____ | _____ |
| 4. Clerical (speed and accuracy with detail, numbers, names, etc.) | _____ | _____ | _____ |
| 5. Leadership | _____ | _____ | _____ |
| 6. Social (ability to get along with others at work and play) | _____ | _____ | _____ |
| 7. Artistic | _____ | _____ | _____ |
| 8. Mental | | | |
| a. Verbal meaning (ability to understand ideas expressed in words) | _____ | _____ | _____ |
| b. Reasoning (ability to solve problems logically) | _____ | _____ | _____ |
| c. Numerical (ability to work with numbers) | _____ | _____ | _____ |
| d. Word fluency (ability to write and talk easily) | _____ | _____ | _____ |
| e. Memory (ability to recall past experiences) | _____ | _____ | _____ |

*No score is necessary on this quiz. The instructor should discuss with the student any item that is marked "below average".

# MY PERSONALITY

For each of the items listed below, check the column which in your opinion describes you most accurately.

| | Never or Poor | Seldom or Fair | Often or Good | Always or Excellent |
|---|---|---|---|---|
| A. APPEARANCE & HEALTH | | | | |
| 1. Health | _____ | _____ | _____ | _____ |
| 2. Posture | _____ | _____ | _____ | _____ |
| 3. Complexion | _____ | _____ | _____ | _____ |
| 4. Facial Expression | _____ | _____ | _____ | _____ |
| 5. Grooming | _____ | _____ | _____ | _____ |
| B. MANNERS | | | | |
| 1. Practices the rules of good etiquette | _____ | _____ | _____ | _____ |
| 2. Table and party manners | _____ | _____ | _____ | _____ |
| C. EXPRESSION | | | | |
| 1. Voice quality | _____ | _____ | _____ | _____ |
| 2. Correct English usage | _____ | _____ | _____ | _____ |
| 3. Pronunciation | _____ | _____ | _____ | _____ |
| 4. Conversational ability | _____ | _____ | _____ | _____ |
| D. PERSONAL TRAITS | | | | |
| 1. Industrious | _____ | _____ | _____ | _____ |
| 2. Emotionally Stable | _____ | _____ | _____ | _____ |
| 3. Cooperative | _____ | _____ | _____ | _____ |
| 4. Honest | _____ | _____ | _____ | _____ |
| 5. Punctual | _____ | _____ | _____ | _____ |

MY PERSONALITY -- continued*

| | Never or Poor | Seldom or Fair | Often or Good | Always or Excellent |
|---|---|---|---|---|
| 6. Sincere | _____ | _____ | _____ | _____ |
| 7. Cheerful | _____ | _____ | _____ | _____ |
| 8. Patient | _____ | _____ | _____ | _____ |
| 9. Loyal | _____ | _____ | _____ | _____ |
| 10. Witty | _____ | _____ | _____ | _____ |
| 11. Dependable | _____ | _____ | _____ | _____ |
| 12. Tactful | _____ | _____ | _____ | _____ |
| 13. Friendly | _____ | _____ | _____ | _____ |
| 14. Self-reliant | _____ | _____ | _____ | _____ |
| 15. Unselfish | _____ | _____ | _____ | _____ |

What strengths and weaknesses might affect your choice of vocation?

What weaknesses might endanger your chance for success?

*No score is necessary. The instructor may discuss with the student any item of concern.

# MY WORK HABITS

Answer YES (letter perfect habit), SO-SO (sometimes), or NO (poor habit) in the answer column, and enter score in score column. Each YES is 3 points, each SO-SO is 2 points, and each NO answer is 1 point.

| STARTING THE WORK PERIOD | ANSWER | SCORE |
|---|---|---|
| Do you: | | |
| 1. Attend class regularly? | _____ | _____ |
| 2. Arrive at class on time or even a few minutes early in order to get organized? | _____ | _____ |
| 3. Enter the room quietly? | _____ | _____ |
| 4. Have with you all materials (books, pencil, paper) needed for the day's work? | _____ | _____ |
| 5. Come to class appropriately dressed and well-groomed? | _____ | _____ |
| 6. Be prepared to take an active part in learning activities? | _____ | _____ |
| 7. Stop talking at the bell without being told? | _____ | _____ |
| WORKING HABITS DURING THE PERIOD | | |
| 8. Devote your full attention to the class? | _____ | _____ |
| 9. Listen carefully, quietly, and courteously to instructions? | _____ | _____ |
| 10. Do all work carefully and according to directions? | _____ | _____ |
| 11. Do you make your own decisions about routine matters or must you constantly ask questions? | _____ | _____ |
| 12. Think while you work so that obvious errors do not slip by? | _____ | _____ |
| 13. Participate in class discussion and learning? | _____ | _____ |

MY WORK HABITS -- continued

| | | ANSWER | SCORE |
|---|---|---|---|
| 14. | Strive for high standards of performance? | _____ | _____ |
| 15. | Turn in neatly done papers on or before deadline? | _____ | _____ |
| 16. | Try always to do satisfactory work rather then to try to find excuses for not doing the work? | _____ | _____ |
| 17. | Work until the end of the class period without a reminder? | _____ | _____ |
| 18. | Make sure your desk or work area is in good order before leaving the room? | _____ | _____ |
| 19. | Always return books and borrowed material to proper place? | _____ | _____ |
| 20. | Show respect for school and personal property? | _____ | _____ |
| 21. | Show respect for classmates? | _____ | _____ |
| 22. | Display traits employers look for in a beginning worker such as dependability, reliability, honesty, efficiency, loyalty and cheerfulness? | _____ | _____ |
| 23. | Remain calm under pressure? | _____ | _____ |
| 24. | Do you leave the room quietly? | _____ | _____ |

SUGGESTED SCALE

| Total Score | Evaluation |
|---|---|
| 61-72 | Very satisfactory work habits |
| 49-60 | Satisfactory work habits |
| 37-48 | Improvement needed |
| 24-36 | Much improvement needed |

SUCCESS--NINETY PERCENT PERSONALITY

I. Give yourself a score of 3 for each of these questions you can answer "YES".

_____ 1. Can you always be depended upon to do what you say you will?

_____ 2. Do you go out of your way cheerfully to help others?

_____ 3. Do you avoid being sarcastic?

_____ 4. Do you avoid exaggeration in all your statements?

_____ 5. Do you refrain from showing off how much you know?

_____ 6. Do you feel at ease with your associates?

_____ 7. Do you keep from reprimanding people who do things that displease you?

_____ 8. Do you refrain from bossing people not employed by you?

_____ 9. Do you avoid making fun of others behind their backs?

_____10. Do you keep from domineering others?

II. Give yourself a score of 2 for each of these questions you can answer "YES".

_____11. Do you keep your clothing neat and tidy?

_____12. Do you avoid being bold and nervy?

_____13. Do you avoid laughing at the mistakes of others?

_____14. Is your attitude toward the opposite sex free from vulgarity?

_____15. Do you avoid finding fault with everyday things?

_____16. Do you let the mistakes of others pass without correcting them?

_____17. Do you loan things to others readily?

_____18. Are you careful not to tell jokes that will embarrass those listening?

_____19. Do you let others have their own way?

_____20. Do you always control your temper?

_____21. Do you keep out of arguments?

SUCCESS -- continued*

_____22. Do you smile pleasantly?

_____23. Do you avoid talking almost continuously?

_____24. Do you keep your nose entirely out of other people's business?

_____25. Do you have patience with modern ideas?

_____26. Do you avoid flattering others?

III. Give yourself a score of 2 for each of these questions you can answer "YES".

_____27. Do you avoid gossiping?

_____28. Do you refrain from asking people to repeat what they have just said?

_____29. Do you avoid asking questions in keeping up a conversation?

_____30. Do you avoid asking favors of others?

_____31. Do you avoid trying to reform others?

_____32. Do you keep your personal troubles to yourself?

_____33. Are you natural rather than dignified?

_____34. Are you usually cheerful?

_____35. Are you usually enthusiastic about what you are doing?

_____36. Do you look upon others without suspicion?

_____37. Do you avoid trying to convert people to your own beliefs?

_____38. Do you avoid being lazy?

_____39. Do you pronounce words correctly?

_____40. Do you refrain from telling people their moral duty?

IV. Discuss briefly your vocational plans for the immediate future and for life. If your plans are still indefinite, discuss some of the problems you are facing in making your decision.

*Out of a total of 90 points for "Yes" answers, if the student answers "Yes" and accumulates 75 points, his/her possibility of success in business is considered very good.

# TASK SIMULATION

Name _____

Date _____

Materials Required: Rough draft of data sheet already prepared and filed, and typing paper of good quality.

Task Setting: Students in Business and Office Education are preparing for their initial interviews and are expected to take with them an original copy of their resumé.

Task: Type a corrected data sheet from rough draft copy.

Steps:
1. Remove rough draft copy from your file.
2. Type corrected resumé.
3. Proofread carefully before removing copy from typewriter.
4. Prepare one Thermo-fax copy to file as a model for preparing additional typewritten copies.
5. File copy in your file for later use.

# TASK SIMULATION

Name _____

Date _____

Materials Provided: Two data sheets in acceptable form for study, one worksheet and typing paper.

Task Setting: Students in the Business and Office Education class must secure and organize information for a personal data sheet to be presented at each interview.

Task: Type in rough draft form the information to be included in a data sheet.

Steps:

1. Study examples of data sheets (resumé) for content and form.
2. Record the information for your data sheet on the worksheet provided either in handwritten or typed form.
3. Type your data sheet in rough draft form.
4. Present typed copy to instructor for approval.
5. Retain the typed copy just completed in your file.

PERSONAL DATA SHEET

NAME: Carol Weber

ADDRESS: 7238 South Campbell Street, Chicago, Illinois 60613

TELEPHONE: 421-2374

POSITION: Secretarial

DATE: June 10, 19--

PERSONAL DATA

Age: 21 years
Height: 5' 3"; weight 116 pounds
Marital Status: Single
Residence: Living with parents

EDUCATION

University: Northwestern University (A.B. degree in 19--, major in secretarial studies, minor in English)
High School: Peoria High School (Graduated fifth in a class of 173)

Major Courses:

| | |
|---|---|
| Accounting | Economics |
| Business Communications | Marketing |
| Business Law | Office Machines |
| Business Mathematics | Office Organization |
| Business Statistics | Secretarial Studies |

Secretarial Skills:
- Shorthand dictation rate--120 words a minute
- Shorthand transcription rate--35 words a minute
- Typewriting straight-copy rate--75 words a minute

Office Machines:
- Can operate the mimeograph and direct-process duplicator
- Have operating knowledge of key-driven and rotary calculator, adding machines, and offset duplicator

EXPERIENCE

Clerk in office of John Hancock Mutual Insurance Company during past three summers
Clerk in office of Dean of Women, Evanston campus, junior year
Business manager of sorority; received room and board as compensation

EXTRACURRICULAR ACTIVITIES

President of Secretarial Studies Club
Member of Sigma Lambda Xi, honorary English fraternity
President of Future Business Leaders of America
Member of Kappa Delta sorority; chairman of social committee

REFERENCES (by permission)

Dr. Harold Ames, Head of Secretarial Studies, Northwestern University, Evanston, Illinois, 866-9832
Mr. Louis Ahearn, Personnel Manager, John Hancock Mutual Insurance Company, Wrigley Building, Chicago, Illinois 60613
Dean Louise Draddy, Northwestern University, Evanston, 866-9832

PERSONAL DATA SHEET
OF
MICHAEL WOOD

Personal Information

| | |
|---|---|
| Age: | 18 |
| Address: | 6310 Green Valley Circle<br>Culver City, CA 90230 |
| Telephone: | 674-3800 |
| Height and Weight: | 6'2", 170 pounds |
| Health: | Excellent |

Education

| | |
|---|---|
| High School: | Culver City High School<br>High school diploma, pending graduation |
| Major: | Business-Economic Education--Academic |
| Grade Average: | B+ (Upper 15% of graduating class) |

School Activities

Member of varsity track team for two years

President of Junior Achievement Club during junior year. Organized the Culver High Products Company, which manufactured and sold tie tacks and decorative pins.

Student body treasurer during senior year. Prepared purchase requisitions and kept records of receipts and disbursements of student body funds.

Work Experience

Newspaper route for one year. Delivered 120 papers a day. Made collections monthly.

Clerk-Typist in an insurance office for two summers. Typed insurance forms and letters, sorted company mail, and did other general clerical work.

References (by permission)

Mr. James Carter. Boys' Adviser, Culver City High School; 4401 Elenda Street; Culver City, CA 90230

Mrs. Rosalyn Kalmar, Business Instructor, Culver City High School; 4401 Elenda Street; Culver City, CA 90230

Mr. Woodrow Baldwin, Office Manager, Pacific States Insurance Company; 10202 Washington Boulevard; Culver City, CA 90230

WORKSHEET

PERSONAL INFORMATION:

EDUCATION:

SCHOOL ACTIVITIES:

WORK EXPERIENCE:

REFERENCES:

Name _____ Estimated Time _____

Date _____ Actual Time _____

Materials Needed: Plain paper
Carbons

Task Setting: Students will type a letter of application and a personal data sheet in Typing Class at school.

Task: Types letter of application and personal data sheet from rough draft.

Steps:

1. Receives rough draft copy of letter and personal data sheet.
2. Read letter that was written by an applicant for a position as a typist and general clerk.
3. Type letter in appropriate form making necessary changes in the wording of the letter.
4. Use own address and signature.
5. Send letter to the Automation Business Systems, Inc., 655 East Meadow Road, Eden, NC 27288, and call it to the attention of the Employment Manager.
6. Use an appropriate salutation and enclosure.
7. Type a data sheet to enclose with letter.
8. Use a 60-space line and center the main heading 1½ inches from top of sheet.
9. The information that you give should be based upon yourself and your own activities.
10. Use the attached data sheet as a guide in preparing your personal data sheet.
11. Proofread work at typewriter and correct errors.
12. Assemble pages and staple in the upper left-hand corner.
13. Prepare letter for mailing.
    a. Fold correctly to insert into envelope.
    b. Prepare envelope using correct mailing address.
    c. Insert, seal, and stamp letter as if it were to be sent to prospective employer.

ROUGH DRAFT OF A LETTER OF APPLICATION

At this morning's conference with you in regard to a position with your company as a typist and general clerk, you asked that I send a written application and submit complete personal and professional information concerning my preparation for office work. I have enclosed a personal data sheet on which information is given concerning my training and part-time work experience. I have ~~also~~ listed the names of four references who have expressed willingness to answer questions ~~concerning~~ about me.

I was graduated from ~~the~~ Morehead Senior High School in June. In my class ~~of 158~~, I ranked ~~ninth~~ in the top fifth. While in school, I participated in student activities and was treasurer of our Future Business Leaders of America Club.

If the results of the test I took and the impression made in the interview for the position warrant your offering me a position, I shall be glad to begin work immediately. You will find me eager to take advantage of this great opportunity. ~~Sincerely yours~~ Very truly yours,

Enclosure

PERSONAL DATA SHEET OUTLINE

Personal

Name: Date of Birth:

Address: Place of Birth:

Telephone: Height:

Age: Weight:

Marital Status: Nationality:

Physical Condition:

Education

Colleges attended:

High school:

Awards

Extracurricular Activities

Skills and Abilities

Work Experience

References

(J-3)

KEY

215 Gracie Street
Eden, North Carolina 27288
July 17, 1974

Automation Business Systems, Inc.
655 East Meadow Road
Eden, North Carolina 27288

ATTENTION: Employment Manager

Gentlemen:

At this morning's conference with you in regard to a position with your company as a typist and general clerk, you asked that I send a written application and submit complete personal and professional information concerning my preparation for office work. I have enclosed a personal data sheet on which information is given concerning my training and part-time work experience. I have listed the names of four references who have expressed a willingness to answer questions about me.

I graduated from Morehead Senior High School in June, and I ranked in the top tenth of my class. While in school, I participated in various student activities and was treasurer of our Future Business Leaders of America Club.

If the results of the test I took for the position, and the impression made in the interview warrant your offering me a position; I shall be glad to begin work immediately. You will find me eager to take advantage of this great opportunity.

Very truly yours,

(Mrs.) Frances B. McNeal

Enclosure

KEY

# PERSONAL DATA SHEET

Name: Frances B. McNeal

Address: 215 Gracie Street
Eden, NC 27288

Telephone: 635-2367

Age: 18 years

Marital Status: Married

Date of Birth: November 1, 1956

Place of Birth: Eden, NC

Height: 5 feet 6 inches

Weight: 125 lbs.

Nationality: American

Physical Condition: Good

## Education

High School: Morehead Senior High School, Eden, NC

Rank in Class: Graduated in top tenth of class

## Awards

High School: National Honor Society Award for Most Outstanding Senior

## Extracurricular Activities

High School: Treasurer of Future Business Leaders of America
State President and State Vice-President of the Future Homemakers of America
A member of the following: Library Club, Student Council, Yearbook Staff and Newspaper Staff

## Skills and Abilities

Shorthand Dictation Rate: 80 words a minute
Transcription Rate for Letters: 50 words a minute
Typewriting, Straight Copy: 60 words a minute

## Work Experience

Stenographic work in the school principal's office
General office work for school teachers, church, and local civic organizations

Personal Data Sheet - continued

## References

Mr. W. A. Newlin, Principal, Morehead High School, Eden, NC 27288

Mr. H. L. Lassiter, Assistant Principal, Morehead High School, Eden, NC 27288

Mrs. R. H. Price, Business Education Instructor, Morehead High School, Eden, NC 27288

Reverend R. J. Howard, Minister, Saint Paul's Baptist Church, Eden, NC 27288

# TASK SIMULATION

Task: Types information on cards from job applications

Equipment and Supplies Needed: Typewriter
3x5 Cards

Steps: The student:

1. Receives job applications from instructor
2. Sets typewriter for double spacing
3. Inserts cards in typewriter to Line 4 with unruled side face up
4. Centers the name and sets a tab stop for succeeding lines at point backspacing stops
5. Types name (last name first) in ALL CAPS
6. Types the present address
7. Types the telephone number preceded by the word "Phone"
8. Proofreads cards for errors
9. Retypes cards on which errors were made
10. Files cards alphabetically in box labeled "Applicants"
11. Files applications alphabetically in folder labeled "Applications for Employment"

# APPLICATION FOR EMPLOYMENT

## State of North Carolina

1. Position(s) applied for Clerk Typist Date July 9, 1974

2. Mr. / Mrs. / Miss Brownstein (Last) Lynda (First) Sue (Middle) - (Maiden)

3. SOCIAL SECURITY NUMBER 219 58 8864

4. Present Mailing Address 2503 Lombard St. (Street & No. or RFD) Greensboro (City) NC (State) 27410 (Zip Code)

Permanent Mailing Address same as above (Street & No. or RFD) (City) (County) (State) (Zip Code)

Telephone: Home 294-9099 Business ____ if none, where can you be reached by telephone? ____

5. DATE OF BIRTH August (Month) 2 (Day) 1950 (Year)

6. MILITARY SERVICE:

(A) Are you a veteran? ☐ Yes ☒ No

(B) Are you a widow of a veteran, or wife of a disabled veteran? ☐ Yes ☐ No

(C) Date of entry into active service ____

(D) Date of separation from active service ____

(E) Type of separation ____

If you had more than one tour of duty, explain in Space No. 18.

7. ETHNIC BACKGROUND

☐ (A) American Indian ☐ (D) Spanish Surnamed American

☐ (B) Black ☒ (E) White

☐ (C) Oriental ☐ (F) Other ____

8. SEX ☐ Male ☒ Female

9. CITIZENSHIP: ☒ U.S. ☐ Other—specify ____

10. Height 5 (Feet) 0 (Inches) Weight 110

INDICATE ANSWER BY PLACING "X" IN PROPER COLUMN

| | Yes | No |
|---|---|---|
| 1. May inquiry be made of your present employer regarding your character, qualifications, etc? | X | |
| 2. Have you ever been convicted of an offense against the law? | | X |
| Are you now under charge for any offense against the law? | | X |

*Note:* You may omit traffic violations for which you paid a fine of $50 or less. You may also omit any other offense committed before your 16th birthday which was finally heard in a juvenile court or under a youth offender law.

If your answer is Yes to either of the above questions, explain in Space No. 18.

| | Yes | No |
|---|---|---|
| 13. Have you any physical defect, disease, or disability? If *Yes*, explain in Space No. 18 | | X |
| 14. Are you employed by the State of North Carolina? | | X |
| Have you filed an Application for Employment with the State of North Carolina within the last two years? | | X |
| 15. Are you related by blood or marriage to any person now employed by the State? If *Yes*, give name, relationship and agency in Space No. 18. | | X |
| 16. Will you accept employment anywhere in the state? If *No*, list preferred areas in Space No. 18 | | X |
| 17. Will you accept employment involving travel? | X | |

18. Use this space to explain an answer (number answers to correspond to questions above; attach additional sheet if needed)

16. Greensboro area

19. REFERENCES: If you wish to list references, please complete the following:

(A) Name Emma Horner Address 33 Star Drive, Greensboro

(B) Name Steven Johnson, manager Address Whole Earth Foods, 18 Spate St., Greensb

(C) Name ____ Address ____

An Equal Opportunity Employer

(J-4)

# APPLICATION FOR EMPLOYMENT

## State of North Carolina

1. Position(s) applied for: Teller — Date: July 10, 1974

2. Mr. / Mrs. / Miss: Johnson (Last) Sallie (First) Ann (Middle) (Maiden)

3. SOCIAL SECURITY NUMBER: 328 46 7291

4. Present Mailing Address: 1110 Cedar St. (Street & No. or RFD) Greensboro (City) (County) NC (State) 27403 (Zip Code)

Permanent Mailing Address: same. (Street & No. or RFD) (City) (County) (State) (Zip Code)

Telephone: Home 299-8061 Business ____ if none, where can you be reached by telephone? ____

5. DATE OF BIRTH: 5 (Month) 11 (Day) 54 (Year)

6. MILITARY SERVICE:
(A) Are you a veteran? ☐ Yes ☒ No
(B) Are you a widow of a veteran, or wife of a disabled veteran? ☐ Yes ☐ No
(C) Date of entry into active service ____
(D) Date of separation from active service ____
(E) Type of separation ____
If you had more than one tour of duty, explain in Space No. 18.

7. ETHNIC BACKGROUND
☐ (A) American Indian ☐ (D) Spanish Surnamed American
☐ (B) Black ☒ (E) White
☐ (C) Oriental ☐ (F) Other ____

8. SEX
☐ Male ☒ Female

9. CITIZENSHIP: ☒ U.S. ☐ Other—specify ____

10. Height 5' (Feet) 3" (Inches) Weight 120

INDICATE ANSWER BY PLACING "X" IN PROPER COLUMN

| | Yes | No |
|---|---|---|
| 1. May inquiry be made of your present employer regarding your character, qualifications, etc? | X | |
| 2. Have you ever been convicted of an offense against the law? | | X |
| Are you now under charges for any offense against the law? | | X |
| *Note:* You may omit traffic violations for which you paid a fine of $50 or less. You may also omit any other offense committed before your 16th birthday which was finally heard in a juvenile court or under a youthful offender law. If your answer is *Yes* to either of the above questions, explain in Space No. 18. | | |
| 13. Have you any physical defect, disease, or disability? If *Yes*, explain in Space No. 18 | | X |
| 14. Are you employed by the State of North Carolina? | | X |
| Have you filed an Application for Employment with the State of North Carolina within the last two years? | | X |
| 15. Are you related by blood or marriage to any person now employed by the State? If *Yes*, give name, relationship and agency in Space No. 18. | | X |
| 16. Will you accept employment anywhere in the state? If *No*, list preferred areas in Space No. 18 | X | |
| 17. Will you accept employment involving travel? | X | |

18. Use this space to explain an answer (number answers to correspond to questions above; attach additional sheet if needed)

19. REFERENCES: If you wish to list references, please complete the following:

(A) Name Dr. Eva Holmes Address 27 Mace Drive, McLeansville, NC

(B) Name Henry James Address Tree's Camping Equipment, 5 Miles Road, Greensboro

(C) Name Anna Serano Address 3332 Fairway Place, Greensboro, NC

*An Equal Oppo unity Employer*

# APPLICATION F R EMPLOYMENT

## State of North Carolina

1. Position(s) applied for SECRETARY Date JULY 1, 1974

2. Mr. / Mrs. / Miss NELSON, MONICA JANE ROBINSON (Last, First, Middle, Maiden)

3. SOCIAL SECURITY NUMBER 474 35 6645

4. Present Mailing Address 1716 LOCUST STREET HIGH POINT N.C. 27513 (Street & No. or RFD, City, County, State, Zip Code)

Permanent Mailing Address SAME AS PRESENT ABOVE (Street & No. or RFD, City, County, State, Zip Code)

Telephone: Home 288-3244 Business ____ if none, where can you be reached by telephone? ____

5. DATE OF BIRTH (Month, Day, Year) FEBRUARY 1, 1948

6. MILITARY SERVICE:
(A) Are you a veteran? ☐ Yes ☐ No
(B) Are you a widow of a veteran, or wife of a disabled veteran? ☐ Yes ☐ No
(C) Date of entry into active service ____
(D) Date of separation from active service ____
(E) Type of separation ____

If you had more than one tour of duty, explain in Space No. 18.

7. ETHNIC BACKGROUND
☐ (A) American Indian ☐ (D) Spanish Surnamed American
☒ (B) Black ☐ (E) White
☐ (C) Oriental ☐ (F) Other ____

8. SEX
☐ Male ☐ Female

9. CITIZENSHIP: ☒ U.S. ☐ Other—specify ____

10. Height 5 (Feet) 5 (Inches) Weight 135

INDICATE ANSWER BY PLACING "X" IN PROPER COLUMN

| | Yes | No |
|---|---|---|
| 1. May inquiry be made of your present employer regarding your character, qualifications, etc? | X | |
| 2. Have you ever been convicted of an offense against the law? | | X |
| Are you now under charges for any offense against the law? | | X |

*Note:* You may omit traffic violations for which you paid a fine of $50 or less. You may also omit any other offense committed before your 16th birthday which was finally heard in a juvenile court or under a youth offender law.

If your answer is Yes to either of the above questions, explain in Space No. 18.

| | Yes | No |
|---|---|---|
| 13. Have you any physical defect, disease, or disability? If Yes, explain in Space No. 18 | | X |
| 14. Are you employed by the State of North Carolina? | | X |
| Have you filed an Application for Employment with the State of North Carolina within the last two years? | | X |
| 15. Are you related by blood or marriage to any person now employed by the State? If Yes, give name, relationship and agency in Space No. 18. | | X |
| 16. Will you accept employment anywhere in the state? If No, list preferred areas in Space No. 18 | | X |
| 17. Will you accept employment involving travel? | | X |

18. Use this space to explain an answer (number answers to correspond to questions above; attach additional sheet if needed)

#16. HIGH POINT/GREENSBORO

19. REFERENCES: If you wish to list references, please complete the following:

(A) Name BRADLEY MASON, PRESIDENT Address MIRO ART SUPPLIES, 10 BRUSH RD., HIGH POINT

(B) Name JACQUELINE POE, MANAGER Address TURNING MUSIC CO., 503 DRUM DRIVE, GREENSB

(C) Name ____ Address ____

BROWNSTEIN, LYNDA SUE
2305 Lombard Street
Greensboro, NC 27410
Phone: 294-9099

JOHNSON, SALLIE ANN
1110 Cedar Street
Greensboro, NC 27403
Phone: 299-8061

NELSON, MONICA JANE
1716 Locust Street
High Point, NC 27513
Phone: 288-3244

TASK SIMULATION

You are to assume you are working in the office of Dr. Russell, the telephone rings, you answer, and the conversation is given below.

Secretary: Dr. Russell's office. Good morning.

Caller: May I speak to Dr. Russell?

Secretary: Dr. Russell is with a patient now; may I help you?

Caller: My son is sick, and I wanted to talk with the doctor.

Secretary: What seems to be wrong with him?

Caller: I don't know. He has a fever and has been vomiting.

Secretary: Let me have Dr. Russell call you. What is your son's name?

Caller: Bobby Cook.

Secretary: How old is Bobby?

Caller: He's eight.

Secretary: And what is your telephone number?

Caller: 765-4824

Secretary: 765-4824. Dr. Russell will call you.

Caller: Thank you. Good bye.

As you were talking with Mrs. Cook, you were getting the information you need to complete the message form that you will give to Dr. Russell so that she may return the call promptly and without problems. Of course, you were writing as you talked so that nothing is left to memory. Complete the form as you would have during the conversation. Place it on Dr. Russell's desk.

MEMO TO CALL

TO_____

FROM_____

PHONE NO. _____

____ Telephoned ____ Please Call

____ Returned Your Call ____ Wants To See You

____ Came To See You ____ Will Call Again

MESSAGE:_____

_____

_____

_____

_____

_____

Rec'd by:_____ Date_____ Time_____

(K-1)

KEY

MEMO TO CALL

TO Dr. Russell

FROM Mrs Cook

PHONE NO. 76E-4824

___ Telephoned X Please Call

___ Returned Your Call ___ Wants To See You

___ Came To See You ___ Will Call Again

MESSAGE: Bobby Cook

Fever & vomiting

3 years old

Rec'd by: student's initials Date 7/18/74 Time am.

TASK SIMULATION

Name _____ Estimated Time _____

Date _____ Actual Time _____

Assumption: The student knows how to type, how to make corrections, and how to arrange a business letter.

The Problem: Type a letter to the Holiday Inn on Interstate 85 in Burlington, NC 27215, requesting hotel reservations for yourself.

The specifications for the request are as follows:

a. One moderately priced single room on the first floor

b. Arrival: August 15, 1974 at 1:00 p.m.

c. Departure: August 16, 1974 at 6:00 p.m.

d. Confirmation necessary

Equipment and Supplies Needed:
Typewriter
Eraser
Envelope
Carbon paper
Copy paper

Procedures:

1. Receives typed copy of request.
2. Organizes specifications of request mentally.
3. Arranges typing paper, carbon, and copy paper that have been provided and inserts the assembled material into the typewriter.
4. Types the letter.
5. Proofreads the letter.
6. Makes corrections if there are errors.
7. Removes material from typewriter.
8. Signs name.
9. Types the envelope.

(your street)
(your city, state, and zip code)
(current date)

Holiday Inn
Interstate 85
Burlington, NC 27215

Gentlemen:

Please reserve a moderately priced single room on the first floor for me for August 15 and 16, 1974. I plan to arrive at 1:00 p.m. on August 15, and I plan to leave at 6:00 p.m. on August 16.

I shall appreciate a confirmation.

Sincerely yours,

(your name)

OFFICE PRACTICE OR TYPEWRITING
TASK SIMULATION

Problem: Type a postal card from direct dictation.

Background: You are employed by Whit Shearin, Chairman of the Business Department at Louisburg College, Louisburg, NC 27549.

Assumptions: The student will have had typewriting.

Equipment Needed: Typewriter

Supplies Needed: Postal card
Typewriter eraser

Procedure: Type from direct dictation from your employer.

Teacher-Employer Procedure: Dictate to the typist the following information to be typed on a postal card:

Send the postal card to: McGraw-Hill Publishing Company, Gregg Division, 680 Forrest Road, N. E., Atlanta, Georgia 30312

Dictate the following message:
Gentlemen: May I please have a copy of your most recent catalogue. Your prompt attention will be greatly appreciated since this is needed for a school decision to be made by August 1. Sincerely,

July 12, 1974

Gentlemen:

May I please have a copy of your most recent catalogue. Your prompt attention will be greatly appreciated since this is needed for a school decision to be made by August 1.

Sincerely,

Whit Shearin, Chairman
Business Department

Business Department
Louisburg College
Louisburg, NC 27549

STAMP
STAMP
STAMP
STAMP

McGraw-Hill Publishing Co.
Gregg Division
680 Forrest Road, N. E.
Atlanta, GA 30312

# TASK SIMULATION

Name _____

Date _____

Objective: To proofread, correct, and type a letter in mailable form.

Supplies: Source document
Dictionary
Letterhead

Directions: Proofread the attached letter. Cross out all incorrect words and write the correct word above. The letter contains twenty-five incorrect words. Using the stationary provided, type the letter in correct form.

Mr. John Smith
514 Crescent Circle
Newtown, NC 29125

Dear Wheeler Owner:

It is a reel pleasure to learn that you are now the owner of the poplar new Wheeler. No matter what make of car you formally drove, we are confidant that you will be delighted by the performance of the currant Wheeler.

Your new Wheeler incorporates a quantity of the new feature and ingenuous devises that iminent automotive engineers have been predicting will be found in the cars of the future. One of the principle advantages of the new model is it's economy. When you exhilarate the engine by stepping down on the peddle, you can be sure that you are going further on less gallons of gasoline.

Another feature that has won complements from new owners is the cradle-soft ride. No matter how averse the road conditions may be, you can be sure of smooth sailing in your new Wheeler. The conditioned-air system enables you to adopt interior temperatures to whether conditions.

Like a fine watch or other intricate mechanism, your new car will deprecate rapidly without it is given the best of care. Your Wheeler dealer is ready to advice you. Please feel free to except his services.

Again, may thanks for your confidants in us as reflected by your purchase of a new Wheeler.

Respectively yours,

(K-4)

KEY

July 16, 1974

Mr. John Smith
514 Crescent Circle
Newtown, NC 29125

Dear Wheeler Owner:

It is a real pleasure to learn that you are now the owner of the popular new Wheeler. No matter which make of car you formerly drove, we are confident that you will be delighted by the performance of the current Wheeler.

Your new Wheeler incorporates a quantity of the new features and ingenious devices that eminent automotive engineers have been predicting will be found in the cars of the future. One of the principal advantages of the new model is its economy. When you accelerate the engine by stepping down on the pedal, you can be sure that you are going farther on less gallons of gasoline.

Another feature that has won compliments from new owners is the cradle-soft ride. No matter how adverse the road conditions may be, you can be sure of smooth sailing in your new Wheeler. The air-conditioned system enables you to adapt interior temperatures to weather conditions.

Like a fine watch or other intricate mechanism, your new car will depreciate rapidly unless it is given the best of care. Your Wheeler dealer is ready to advise you. Please feel free to accept his services.

Again, many thanks for your confidence in us as reflected by your purchase of a new Wheeler.

Respectfully yours,

# TASK SIMULATION

Assumption: The student knows how to type, how to make corrections, and the purpose of an itinerary.

The Problem: Type an itinerary for Fred Wade using the unarranged attached data concerning the trip. Refer to the guide provided as an outline for your itinerary.

Equipment and Supplies Needed:
Typewriter
Eraser
Typing Paper

Procedures:

1. Receives unarranged data and itinerary guide.
2. Reads thoroughly the unarranged data and the itinerary guide.
3. Types itinerary from unarranged data according to guide.
4. Proofreads itinerary.
5. Makes corrections if necessary.

Information for Itinerary:

On Wednesday, July 24, 1974, at 4:50 p.m., Mr. Fred Wade plans to leave Greensboro-Highpoint Airport on Eastern Airlines Flight 329 and will arrive at Kennedy Airport in New York at 6:16 p.m. He will meet Mr. Richard Smith at 8:15 for dinner at the Playboy Club in New York City.

On Thursday, July 25, 1974, he plans to meet with Mr. Sammy Davis at Ciba-Geigy in Ardsley, New York at 10:30 a.m. On Thursday afternoon he plans to leave Kennedy Airport at 3:15 p.m on Eastern Flight 440 and will arrive at the Greensboro-Highpoint Airport at 4:20 p.m.

Itinerary Guide:

ITINERARY

FOR

FRED WADE

Wednesday, July 24, 1974, Greensboro to New York

| Time | City | Via |
|---|---|---|

Thursday, July 25, 1974, New York to Greensboro

| Time | City | Via |
|---|---|---|

(K-5)

KEY

ITINERARY

FOR

FRED WADE

Wednesday, July 24, 1974, Greensboro to New York

| Time | City | Via |
|---|---|---|
| 4:50 p.m. | Leave Greensboro Airport | Eastern Airlines Flight 329 |
| 6:16 p.m. | Arrive Kennedy Airport New York | |
| 8:15 p.m. | New York City - Playboy Club dinner with Mr. Richard Smith | |

Thursday, July 25, 1974, New York to Greensboro

| Time | City | Via |
|---|---|---|
| 10:30 a.m. | Ardsley, New York meeting with Mr. Sammy Davis at Ciba-Geigy | |
| 3:15 p.m. | Leave Kennedy Airport | Eastern Airlines Flight 440 |
| 4:20 p.m. | Arrive at Greensboro Airport | |

TASK SIMULATION

Typing an Agenda
Post-Secondary Level

Task: You are a secreatry at Roanoke-Chowan Technical Institute in Ahoskie. Your boss has asked you to type the attached rough draft making the necessary corrections as indicated on the sheet in ink.

Objective: The secretary will type an agenda from a rough draft copy.

Assumptions: The student can type and proofread correctly.

Supplies needed:
Typing paper
Carbon paper
Typewriter
Correction tape
File folder

Porcedures:
1. Receives rough draft of an agenda.
2. Types an original and one carbon copy of the agenda.
3. Proofreads agenda before taking typed copy out of typewriter.
4. Places the original copy into a folder labeled - Folder No. 2.
5. Staples the carbon copy and the rough draft copy together and inserts into - Folder No. 2.
6. Gives folder to boss.

ROANOKE-CHOWAN TECHNICAL INSTITUTE
AHOSKIE, NORTH CAROLINA

# A G E N D A

Trustees' Meeting
~~March 28, 1974~~ July 12, 1974

I. Call to Order

II. Roll Call

III. Consideration and disposition of the minutes of the meeting of ~~January 21, 1974~~ March 28, 1974

IV. Report of Executive Committee

V. Reports of Special Committees
1. Nominating
2. Budget
3. Personnel
4. Bond Referendum
5. Building

VI. Old Business
~~Selection of Building Contractor~~ Legal Counsel

VII. Consideration of New Business

1. Items related to education
~~a. Curriculum development - Cosmetology~~ a. Amendment of contract
~~b. Curriculum development - Accounting~~
b. Contract agreement with private schools to offer instruction in cosmetology.

2. Items related to buildings and grounds
a. Report of Architect on ~~new building~~ items omitted from contract

3. ~~Items related to finance~~
a. ~~Transfer of projected surplus local current expense budget to capital outlay~~
b. ~~Investment of special funds~~

OMIT & INSERT FROM BELOW

VIII. Other New Business

IX. Reports by the President
1. Audit-inventory of equipment
2. ~~Legal Counsel~~ → Educational leave
3. ~~Certificates of appreciation to Bond Referendum Workers~~ Conservation of fuel

X. Adjournment

3. Items related to personnel
a. Employment of personnel, 1974-75 (letter of intent)
b. Make-up of snow days
c. Hospitalization insurance for part-time employees
d. Policy statement on absences (I&A Handbook)

ROANOKE-CHOWAN TECHNICAL INSTITUTE
AHOSKIE, NORTH CAROLINA

# A G E N D A

Trustees' Meeting
July 12, 1974

Call to Order

Roll Call

Consideration and disposition of the minutes of the meeting of March 28, 1974

Report of Executive Committee

Reports of Special Committees
1. Nominating
2. Budget
3. Personnel
4. Bond Referendum
5. Building

Old Business
1. Legal Counsel

Consideration of New Business

1. Items related to education
   a. Amendment of contract
   b. Contractual agreement with private schools to offer instruction in cosmetology

2. Items related to buildings and grounds
   a. Report of Architect on items omitted from contract

3. Items related to personnel
   a. Employment of personnel, 1974-75 (Letters of intent)
   b. Make-up of snow days
   c. Hospitalization insurance for part-time employees
   d. Policy statement on absences (14A Handbook)

Reports by the President
1. Audit-inventory of equipment
2. Educational Leave
3. Conservation of fuel

Other New Business

Adjournment

# TASK SIMULATION

## Secretarial

Task: Write a brief letter accepting an invitation to speak.

Procedures:

1. Compose and type a brief acceptance letter over Mr. Hamil's signature, making one carbon copy (for Mr. Hamil's personal file) and an envelope.
2. Give Mr. Hamil the letter for signature then follow the correct procedure for putting it in the outgoing mail.
3. Staple the carbon copy on top of the letter of request and place them in his personal file.
4. Make a note on your desk calendar on the page dated August 12 to remind Mr. Hamil of this speech to be made and check to see that he also has a reminder note on his own calendar.

1909 Halifax Court
High Point, NC 27260
July 3, 1974

Mr. John Hamil
Guilford Technical Institute
Box 309
Jamestown, NC 27282

Dear Mr. Hamil:

The High Point Chapter of Legal Secretaries is to be host to the Greensboro and Winston-Salem Chapters at a luncheon meeting on Saturday, August 17, at the YWCA in High Point.

We should be very pleased if you could be with us and speak to the group on "Safety in the Office". We have allowed approximately 45 minutes for this part of the program and should like you to allow about 10-15 minutes of that time for a question-answer period. The luncheon, at which you would be our guest, of course, will be served at 12:00, followed by the program.

We hope very much that you can be with us at the luncheon and will be our guest speaker. You may call me at 454-3230 in High Point or write me at the above address.

Most sincerely,

Doris Simone

(Mrs.) Doris Simone
Program Chairman

type a brief answer saying I am gratified to be invited to speak and shall be happy to do so. I will sign it. Make a note on your calendar to remind me of it the first of that week.

(K-7)

Suggested KEY

GUILFORD TECHNICAL INSTITUTE • JAMESTOWN, NORTH CAROLINA 27282

July 8, 1974

Mrs. Doris Simone
1909 Halifax Court
High Point, NC 27260

Dear Mrs. Simone:

It was very gratifying to receive the invitation to speak at your luncheon at the High Point YWCA on Saturday, August 19, at 12:00. I shall be happy to do so and am looking forward to meeting with the three chapters of Legal Secretaries at that time.

Sincerely yours,

John Hamil

JH:dw

ENVELOPE ADDRESS

Mrs. Doris Simone
1909 Halifax Court
High Point, NC 27260

(K-7)

KEY

Carbon copy of acceptance letter, stapled to the letter of request, should be placed in the Personal file in chronological order unless Mr. Hamil has previously specified another placement in the folder.

MONDAY Sec.

12

AUG. 1974

Remind Mr. Hamil of speech to be given Saturday, Aug 17, to Legal Secretaries on "Safety in the Office" luncheon at 12:00, High Point YWCA (on Gatewood ave.)



MONDAY Hamil

12

AUG. 1974

Prepare speech for Legal Secretaries meeting - "Safety in the Office". meeting Saturday, Aug. 17, 12:00, High Point YWCA.

224 - MONDAY, AUG. 12 - 141

# TASK SIMULATION

Task: Student is to schedule appointment, to compose and type a letter, and address an envelope confirming the appointment.

Supplies Needed:
- Sheet from appointment book
- Letterhead
- Envelope
- Carbon paper
- Carbon copy paper

Note to the Teacher: After supplies have been provided, assume the role of the doctor and place on the student's desk the copy of the incoming letter.

(K-8)

BARKER-MAVIS PHARMACEUTICALS

Howard Ewe, President
912-799-3232

7744 Pine Street
Atlanta, GA 42902

July 12, 1974

Dr. Dorothy Russell
3815 Crosland Lane
Winston-Salem, NC 27106

Dear Dr. Russell:

My schedule will put me in your territory on the 29th of the month, and I hope that you will be able to take some time from your busy practice to give me a few minutes. Barker-Mavis is placing a new drug for hypertension on the market early in August, and we want you to be aware of its advantages.

Please let me know when I may talk with you and give you some complimentary samples.

Yours very truly,

Phil N Better

Phil N. Better
Sales Representative

See if you can work in Phil and answer his letter for me.
DR

APPOINTMENTS

JULY

29

1974

| | | |
|---|---|---|
| AM | 9:00 | Vern Johnson |
| | 9:30 | C.J. Kravesky |
| | 10:00 | |
| | 10:30 | Hunt: C. Friday |
| | 11:00 | Scott Lewis |
| | 11:30 | H.M. Jamieson |
| | 12:00 | |
| PM | 12:30 | |
| | 1:00 | Nancy Parsons |
| | 1:30 | Daniel Young |
| | 2:00 | J.B. McCrodden |
| | 2:30 | J. Wallace Davis |
| | 3:00 | Alfred Prater |
| | 3:30 | Tracy Gilliam |
| | 4:00 | Alexander Dumas |
| | 4:30 | ~~Cary Street~~ Billy Sale |
| | 5:00 | Bernie McDaniels |
| | 5:30 | Martha Simmons |

(K-8)

KEY

APPOINTMENTS

JULY

29

1974

| | |
|---|---|
| AM 9:00 | Helen Johnson |
| 9:30 | C.J. Kaminsky |
| 10:00 | Phil N. Better - Barker-Mavis Pharm. |
| 10:30 | Frank C. Friday |
| 11:00 | Scott Lewis. |
| 11:30 | D.M. Jamick |
| 12:00 | |
| PM 12:30 | |
| 1:00 | Nancy Barnes |
| 1:30 | Daniel Young |
| 2:00 | J.B. McGookin |
| 2:30 | J. Wallace Davis |
| 3:00 | Alfred Porter |
| 3:30 | Tracy Gilbertson |
| 4:00 | Alexander Dumas |
| 4:30 | ~~Guy Street~~ Billy Jones |
| 5:00 | Bernie McDaniels |
| 5:30 | Martin Simmons |

(K-8)

KEY

Dorothy Russell, M. D.
3815 Crosland Lane
Winston-Salem, NC 27106
766-2700

July 14, 1974

Mr. Phil N. Better
Sales Representative
Barker-Mavis Pharmaceuticals
7744 Pine Street
Atlanta, GA 42902

Dear Phil:

Thank you for your offer to inform me of your new drug for hypertension.

On the morning of Monday, July 29, at ten o'clock, I shall be happy to meet with you in my office.

Very truly yours,

Dorothy Russell, M. D.

hs

NOTE: Students' solutions may vary.

ENVELOPE ADDRESS

Mr. Phil N. Better
Sales Representative
Barker-Mavis Pharmaceuticals
7744 Pine Street
Atlanta, GA 42902

# TASK SIMULATION

Name _____ Estimated Time _____

Date _____ Actual Time _____

Task: Type this handwritten Partnership Agreement using correct form. Capitalize where necessary. Type on plain paper.

Equipment and Supplies Needed: Typewriter
Typing paper
Carbon copy

Procedures:

1. Receives handwritten copy of agreement.
2. Correct all errors and check capitalization.
3. Obtain typing paper and carbon copies and insert them into typewriter.
4. Type agreement, but before taking out of typewriter. check typographical errors.
5. Separate carbons from original. File carbons in file cabinet.
6. Place original on President's desk.

# Partnership Agreement

(L-1)

① This agreement, made in the city of Charlotte, state of North Carolina, on the sixteenth day of July, 1974, between David Richmond and Robert Meeks, both of Charlotte, North Carolina, ② Wherein it is mutually agreed, as follows: 1. That the parties hereto shall, as partners, engage in and conduct the business of buying, selling, and installing automatic attachments for opening doors. 2. That the name of the partnership shall be SUNSET AUTOMATIC DOORS. 3. That the capital of the partnership shall be the sum of twenty thousand dollars ($20,000); and each party shall contribute thereto, with the execution of this agreement, the sum of ten thousand dollars ($10,000) in cash. 4. That at the end of each calendar year the net profit or net loss shall be divided equally between the parties hereto, and the account of each shall be credited or debited as the case my be, with his proportionate shares thereof. ③ In witness whereof, the said parties have here unto set their hands the day and year first above written.

# PARTNERSHIP AGREEMENT

THIS AGREEMENT, made in the City of Charlotte, State of North Carolina, on the sixteenth day of July, 1974, between DAVID RICHMOND and ROBERT MEEKS, both of Charlotte, North Carolina,

WHEREIN IT IS MUTUTALLY AGREED, AS FOLLOWS:

1. That the parties hereto shall, as partners, engage in and conduct the business of buying, selling, and installing automatic attachments for opening doors.

2. That the name of the partnership shall be SUNSET AUTOMATIC DOORS.

3. That the capital of the partnership shall be the sum of Twenty thousand dollars ($20,000); and each party shall contribute thereto, with the execution of this agreement, the sum of Ten thousand dollars ($10,000) in cash.

4. That at the end of each calendar year the new profit or loss shall be divided equally between the parties hereto, and the account of each shall be credited or debited as the case may be, with his proportionate shares thereof.

IN WITNESS WHEREOF, the said parties have hereunto set their hands the day and year first above written

_____

_____

Signed and delivered
in the presence of

_____

_____

# TASK SIMULATION

Name _____ Estimated Time _____

Date _____ Actual Time _____

Task: Prepare handwritten birth certificate from Delivery Room records.

Task Setting: Modern office in the Vital Records Branch of a large hospital.

Assumptions: The student's handwriting is legible.

The student has had some training preparing various forms used by business firms and other institutions.

Materials Needed: Delivery Room record
Birth Certificate
Ink Pen

Procedures:

1. Obtain copies of the Delivery Room records for April 30, 1972 from the Record Room.
2. Obtain brith certificate form from desk drawer.
3. Prepare handwritten birth certificate for Olivetti Latahnya Blue. Birth No. 132.
4. Check birth certificate for accuracy.
5. Place completed birth certificate on the administrator's desk for his signature, and return the Delivery Room copies to the File Clerk's Basket.

(M-1)

# REX HOSPITAL

RALEIGH, NORTH CAROLINA

LABOR RECORD

Name: Mrs. Hattie J. Blue ADDRESS: 138 Cole Street Burlington, C

Date and Hour of Adm. 7/29/72 - 11:45 P.M. Date and Hour of Del. 7/30/72 7:00

EDC PARA GRAVIDA

Pains began 11:00 P.M.

Membranes Ruptured M. Spont. A

Cervix fully dilated 6:45 A. M. Duration 1st Stage hrs. M

Child delivered 7:00 A. M. Duration 2nd Stage hrs. M

Placenta delivered 7:15 A. M. Duration 3rd Stage hrs. M

Onset: Spont. Induced Stimulated. TOTAL DURATION hrs. M

EXAMINATIONS DURING LABOR

R—Rectal V—Vaginal

| DATE | Hour | B.P. | Pos | F.H. | Eff. | Dil | Memb. | Station | R or V | Remarks | Initial |
|---|---|---|---|---|---|---|---|---|---|---|---|
| ON ADM | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

FIRST STAGE NOTES:

Medications: None

Complications: None

SECOND STAGE NOTES: Episiotomy: Lacerations: Repair:

Operations: (Forceps, Etc.)

Position: Medications:

Complications:

THIRD STAGE NOTES: (Abnormalities, complications, Etc.) No abnormalities or complications

Placenta and Membranes: Cervical Inspection:

Method of Delivery: Estimated Blood Loss:

Medications: Postpartum B.P.

ANESTHETIC: DURATION: Hrs. M

Anesthetist: Complications:

SUMMARY OF LABOR:

INFANT: Sex: Female Wt. 7lbs 12oz Condition at Birth: Healthy and Normal

Resp. Spont. Delayed Min. Cry: Spont. Delayed Min. Resuscitation:

Abnormalities: None

Cord: Eyes:

Neonatal Complications:

Date of Disch. 5/5/72 Wt. 7lbs 14oz Condition: Mother & Baby healthy

## OBSTETRICAL TERMS and CODES

M. Vincetti, M.

### DISEASES

780-000-Newborn
750-660-Vertex
750-643-L O P
750-644-R O P
750-645-L O T
750-647-R O T
750-670-Breech
750-680-Brow
750-683-Face
750-685-Transverse
750-690-Compound
750-6Y0-Undetermined
750-694-P L C
780-003-Term. Neonatal Death

7x2-000-Preg. Del.
780-007-Premature, Neonatal Death
7x1-001-F T S B-Atepartum Death
7x2-002-F T S B-Intrapartum Death
7x2-004 Premature Delivery
7x2-006-P S B-Antepartum Death
7x2-006 P S B-Intrapartum Death
7x2-037-Double Ovum Twins
7x2-0371-Single Ovum Twins
7x2-789-Preg. undel.
7x2-65x-False labor
7x2-631-Threatened Premature Del.
7x2-0002-Abortion complete
7x2-0003-Abortion, incomplete

7x2-631-Abortion threatened
7x2 640.7-PP Hem., Uterine inertia
7x2-614.7-PP Hem., Ret. Secund.
7x2-412-Lac. cervix
7xx-412-2° laceration
7xx-400.6-3° laceration & 4°
7x1-412-Lac. Vagina
794-4x4-Adherent placenta
794-631-Placenta previa
794 800 8 Premature separation
794-614 Retained placenta
013-368 Eclampsia
014-369 Pre-eclampsia
460 631 HyD

013-368-Hyperemesis
400 533-HCVD
300-p10.7-Amenia, blood loss
301 5291-Erythroblastosis
5xx - RH Neg. NA
5xx - RH Neg. + antibodies
671 765-Diabetes
821-Decreased G T T
410-032 0 RHD, inactive
7x61-100-Intrapartum infection
7x5-100-PP Endometritis
732 100-Pyelitis
795 600.8-Premature rupt. of membs.
Hx-640 Contracted Pelvis

### OPERATIONS

7x60-71-Epis. c repair
074-710-Rep. 1°lac.
074-711-Rep 2°lac
7x3-71-Rep. cervix lac.
7x1-71-Rep. vag. lac.
787-13 Partial salpingectomy

783-104-D &C. for incomplete abort.
780-650-Low forceps
780-651-Mid forceps - Piper forceps
780-67-Manual rotation - forceps rotat.
780-691-Spont. breech
780-693-Partial breech extract.

780-691-Total breech extract.
7x73-04-Classical c. section
7x24-04 Low cervical c. section
7x2-041-Porro's section
780-13-Exc. Ectopic preg.
780-653-Amniotomy

660-31 Blood Transfusion
Induction, elective
Induction, indicated
Stimulation of labor
7x1-11-Exc. local lesion vulva

L-20-A

# CERTIFICATE OF LIVE BIRTH

(M-1)

BIRTH NO. 132

| | | | | |
|---|---|---|---|---|
| Olivetti | Latahnya | Blue | | Female |
| Single | | 4 30 1972 | | 7 A. |

**CHILD**

Jefferson

Birmingham, Alabama

L. Richardson Memorial
8 Lamar St., Birmingham, Ala. — Yes

Alabama — Jefferson

Birmingham

138 Cutie Street — Yes

**MOTHER**

| | | | |
|---|---|---|---|
| Oliver | (None) | Blue | 28 |
| Hattie | Johnson | Blue | 21 |

**ATTENDANT**

A. H. Vincetti, M.D.

May 5, 1972

A. H. Vincetti, M. D. — 1418 Lawrence St., Birmingham, Alabama

4/30/72 — [illegible] — 5/5/72

FOR MEDICAL AND HEALTH USE ONLY

**FATHER**

| | | | | | |
|---|---|---|---|---|---|
| Black | 8 | 12 | 16 | None | |

**MOTHER**

| | | | | | |
|---|---|---|---|---|---|
| Black | 8 | 12 | 17 | None | None |

| | | | | |
|---|---|---|---|---|
| 8 1 71 | Second | 12 | | |
| 7 8 | Yes | Yes | | |

(M-1) KEY

# Rex Hospital Birth Record

1311 SAINT MARY'S STREET / RALEIGH, NORTH CAROLINA 27603

128

*This Certifies that* Olivetti Latahnya Blue

*was born to* Hattie Johnson Blue

*in this hospital at* Seven *a.m.*

*the* 30th *day of* April *A. D. 19*72

*In Witness Whereof, Rex Hospital has caused this Record of Birth to be signed by its duly authorized officer and its Official Seal to be hereunto affixed*

Joseph E Barnes

HOSPITAL DIRECTOR

ATTENDING PHYSICIAN

TASK SIMULATION

Office Machines

Name _____ Estimated Time _____

Date _____ Actual Time _____

Task: The paper tape on your Victor ten-key has run out. A new tape must be properly inserted into the adding machine.

Setting: James and Whitmore is an accounting firm. As a secretary for this firm, you complete numerous arithmetic operations using the Victor ten-key adding machine. You have been employed by this firm for three days.

Equipment and Supplies Needed: Victor ten-key adding machine
One roll of 2¼-inch wide paper tape

Procedures:

1. Lift machine lid* to expose used tape.
2. Study illustration 1 on proper insertion of paper. Notice particularly the flow of the paper through the machine. The paper unwinds in a clockwise direction.
3. Squeeze both sides of the paper core bar (labeled A in illustrations 2 and 3) to lift used paper core from machine.
4. If paper is not completely used up, tear it in half. Unwind trail paper remaining in machine by turning the paper forward dial (labeled B in illustration 1) clockwise.
5. Tear off gummed section on the new roll of paper and discard. Unwind approximately six inches of paper.
6. Insert paper core bar through the new roll of paper.
7. Replace paper core bar into paper core bar holders (labeled C in illustration 3), making certain that the flow of paper tape is in the clockwise direction as illustrated.
8. Make certain that the end of the paper is cut (or torn) straight. This makes paper insertion easier.

*Machines in illustration 1 are shown without machine lids.

9. Bring paper over the paper tension control bar (labeled D in illustration 3) and feed into machine as far as possible manually.

10. Complete rotation of paper into machine by turning the paper forward dial (labeled B in illustration 1) clockwise.

11. Close machine lid. Paper tape is now in position to begin additional arithmetic operations.

# PROPER INSERTION OF PAPER TAPE IN ADDING MACHINE

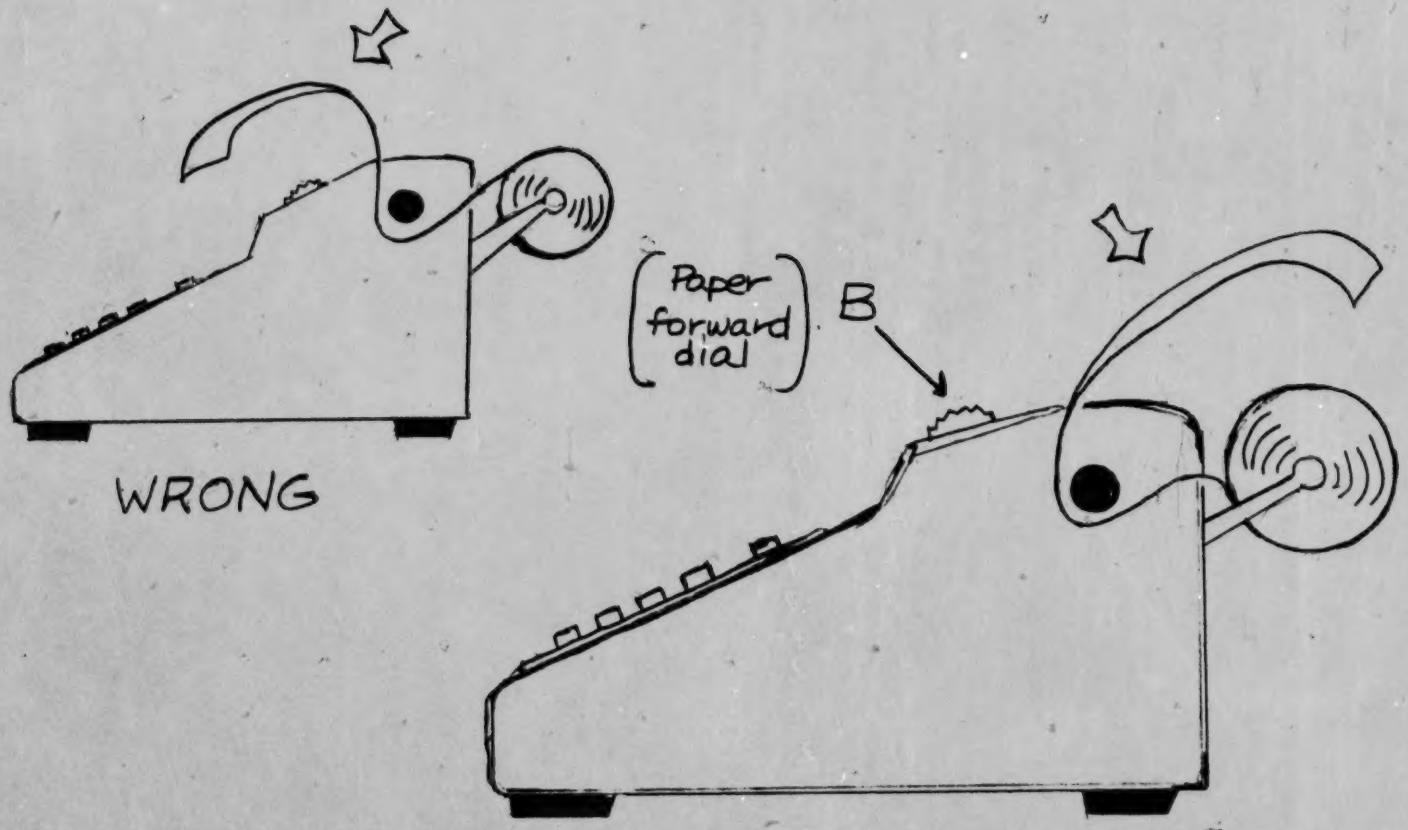



ILLUSTRATION 1

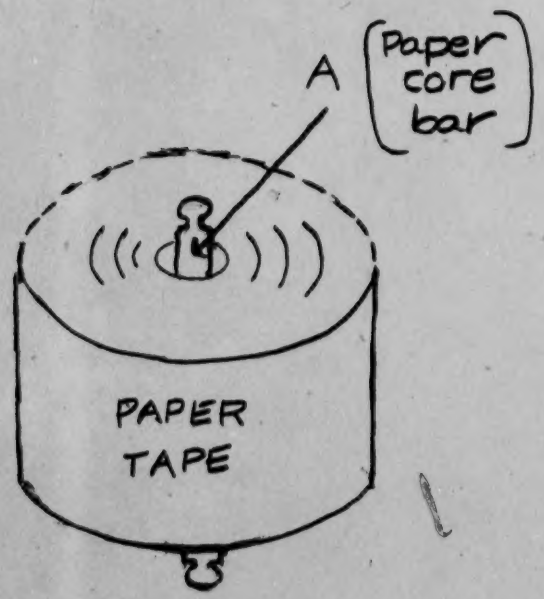



ILLUSTRATION 2

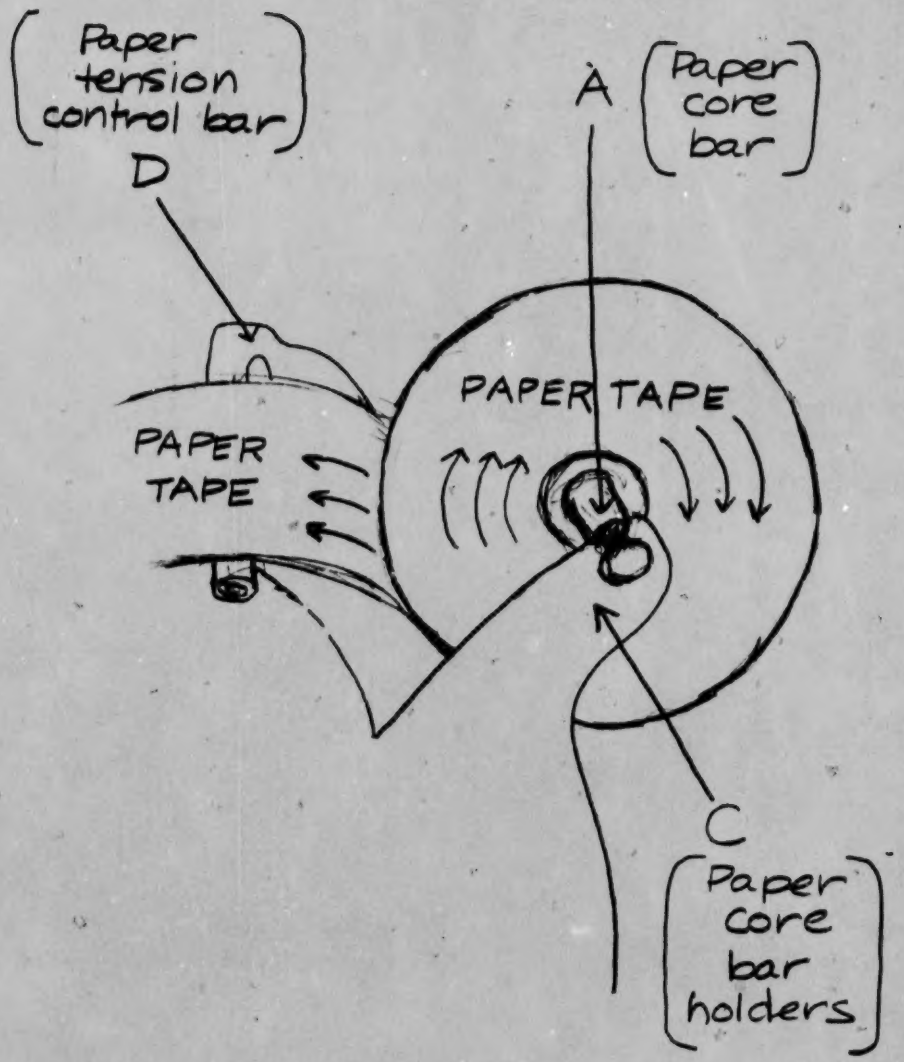



ILLUSTRATION 3

# TASK SIMULATION

## Bank Deposit

Task: Prepare a deposit ticket in duplicate for depositing money and check receipts in the bank.

Setting: Smith Auto Parts in Burlington, North Carolina, is a small wholesaler and retailer of auto parts and accessories. The office workers are a bookkeeper and a secretary. The bookkeeper receives the cash and check receipts from the sales each day and deposits the money and checks in the bank.

Assumptions: The student will have had:

Training on adding machine
Training in the general make-up of a check
Training in the endorsement of checks
Training in basic business arithmetic

Equipment and Supplies Needed:
Adding machine
Fountain pen
Deposit ticket (2)
Carbon paper
Paper clip (2)
Checks
Currency

Procedure:

1. Separate items to be deposited into two groups - currency and checks.
2. Endorse checks.
3. Group checks according to transit numbers.
4. Count currency using adding machine.
5. Total adding machine.
6. Enter total on first line of deposit ticket.
7. List checks by transit numbers and amounts on deposit ticket. (You will need to use the back side to complete listing.)
8. Add checks listed on back on adding machine.
9. Enter total on line marked TOTAL on back side.
10. Transfer check total to front of deposit ticket on line marked "Total from other side".

11. Add cash, checks and "Total from other side" and enter amount on line marked TOTAL.

12. Enter the date on deposit ticket.

13. Arrange all currency face up, turned the same way, with smallest denomination on the bottom. Secure currency with paper clip.

14. Arrange checks in the same order listed on deposit ticket and secure with paper clip.

*15. Place both currency and checks along with two copies of deposit ticket in the bank bag.

NOTE: The teacher should write some checks, purchase currency (play money) and obtain bank deposit tickets from bank.

*It should be noted that when coins are in the cash receipts to be deposited, they are to be counted as part of the cash total.

TASK SIMULATION

Bank Transaction

Task: Making a Checking Account Deposit and Writing a Check.

Assumptions: The student will have had some practice in making deposits and writing checks.

The Problem: You are in the process of opening a checking account at Wachovia Bank and Trust Company. The signature card has already been completed and your Account Number is 1-234-567. Your check is in the amount of $65.80 and you wish to keep $5.80 in cash.

You received from the bank a book of checks and your first purchase will be a sweater at Prago Guyes for $7.26.

Supplies Needed: Deposit Ticket
Check with stub attached

Procedures:

1. On the checking account deposit slip, fill in the following:
   a. Date
   b. Your name as it appears on the signature card
   c. Your account number
   d. Enter the total amount of your check
   e. Enter the same amount for sub total
   f. Enter the amount you want to keep for less cash received
   g. Write your initials on the line provided
   h. Subtract the cash amount you want to keep from the sub total and enter this figure for total (total deposited)
2. Prepare the check stub by entering the following on the designated lines:
   a. Check number and amount of check
   b. Date
   c. To whom the check will be written
   d. Record what the check is for
   e. Enter amount deposited
   f. Total amount deposited
   g. Enter the amount of the check you will write
   h. Subtract the amount of this check from the total and enter this figure for balance carried forward

3. Write the check:

   a. Enter the check number
   b. Fill in the date
   c. Make the check payable to the store from which you are making the purchase
   d. Enter the amount of the purchase in figures
   e. Spell out the dollar amount of the check and write the cents amount in figures
   f. Record what the check is for
   g. Sign your name exactly the way it appears on your signature card

FORM

Deposited In

FIRST NATIONAL BANK
Checking Account

Date July 17, 1974

Deposit to Account of ann jones
# 1-234-567

| | | Dollars | Cents |
|---|---|---|---|
| Currency | | | |
| Coin | | | |
| Checks (List separately) | 1 | 65 | 80 |
| | 2 | | |
| | 3 | | |
| SUB TOTAL | | 65 | 80 |
| LESS CASH | | 5 | 80 |
| TOTAL | | 60 | 00 |

This deposit accepted under and subject to the provisions of the Uniform Commercial Code.

:071100101: 64 630 188:

137

1

| | | |
|---|---|---|
| BAL. BRO'T FOR'D | 60 | 00 |
| DEPOSITS | | |
| TOTAL | 60 | 00 |
| AMOUNT THIS CHECK | 7 | 26 |
| BALANCE | 52 | 74 |

Prago Guyes ORDER OF 19 74
July 17
Sweater
FOR

No. 1

Salem, State July 17 19 74 67-5 513

Pay to the order of Prago Guyes $ 7.26

Seven and 26/100 Dollars

First National Bank

For Sweater ann jones

:0513 0005: 242 0 027720

KEY (0-2)

# TASK SIMULATION

## Checkbook Balance

**Task:** Bring the checkbook balance up-to-date by subtracting the checks written and adding the bank deposits made.

**Setting:** Kinwood Outlet is a small retail store located in Burlington, North Carolina. The outlet store retails hosiery products to its customers. The office workers include you, a "bookkeeper", who is in charge of simple record-keeping procedures.

It is Wednesday, August 10, and you have completed the writing of checks in payment of current invoices. You have also entered on the check stubs deposits that you made on Monday, August 8, and Tuesday, August 9.

**Assumptions:** The student will have had:

Training in basic business arithmetic
Training in the operation of adding machine
Training in the general make-up of a check
Training in writing legibly

**Equipment and Supplies Needed:**
Checkbook stubs
Fountain pen
Adding machine

**Procedure:**

1. Enter on adding machine the "Balance brought forward" found on check stub #101.
2. Add bank deposit entered on check stub #101.
3. Sub-total adding machine, and enter amount on "Balance" line above check amount.
4. Subract check stub #101--amount $1,500.00.
5. Sub-total and enter amount on "Balance" line below check amount.
6. Continue in same manner of adding deposits, subtracting checks, and recording balances.
7. At the end of each page, carry balance forward to the top of next page.
8. Continue the procedure through check stub #112.

NO. 101 — BAL. BRO'T FOR'D [illegible]

August 10 19 14 — ORDER OF Standard Machinery Co. — FOR equipment 1,500-

8/8 2,050 75

TOTAL

AMOUNT THIS CHECK 1,500 00

BALANCE

NO. 102

August 10 19 14 — ORDER OF [illegible] Co.

FOR Supplies 1469 -

8/9 3,117 66

TOTAL

AMOUNT THIS CHECK 469 00

BALANCE

NO. 103

August 10 19 14 — ORDER OF [illegible]

FOR [illegible] 1500.

TOTAL

AMOUNT THIS CHECK 1,500 00

BALANCE

NO. 104 — BAL. BRO'T FOR'D

August 10 19 14 — ORDER OF Knitting Sales, Inc.

FOR [illegible] #412.03

TOTAL

AMOUNT THIS CHECK 412 03

BALANCE

NO. 105

August 12 19 14 — ORDER OF Carolina Transport Co.

FOR freight $244.31

TOTAL

AMOUNT THIS CHECK 244 31

BALANCE

NO. 106

August 12 19 14 — ORDER OF [illegible] Co.

FOR utilities $1,477.11

TOTAL

AMOUNT THIS CHECK 1,477 11

BALANCE

DEPOSITS

NO. 107 — BAL. BRO'T FOR'D

August 10, 19 74
ORDER OF
Southern Bell T&T

FOR
Service
142 00

DEPOSITS

TOTAL

AMOUNT THIS CHECK 142 00

BALANCE

NO. 108

August 10, 19 74
ORDER OF
Atlanta Purchasing

FOR
Cats
71 12

DEPOSITS

TOTAL

AMOUNT THIS CHECK 71 12

BALANCE

NO. 109

August 10, 19 74
ORDER OF
Uniform Outfitters

FOR
supplies
111 75

DEPOSITS

TOTAL

AMOUNT THIS CHECK 111 75

BALANCE

NO. 110 — BAL. BRO'T FOR'D

August 10 19 74
ORDER OF
Bill Blass Inc.

FOR
merchandise
1,000 29

DEPOSITS

TOTAL

AMOUNT THIS CHECK 1,000 29

BALANCE

NO. 111

August 10, 19 74
ORDER OF
Radice, Inc

FOR
merchandise
943 12

DEPOSITS

TOTAL

AMOUNT THIS CHECK 943 12

BALANCE

NO. 112

August 10 19 74
ORDER OF
David Orlon Inc.

FOR
merchandise
343 60

DEPOSITS

TOTAL

AMOUNT THIS CHECK 343 60

BALANCE

KEY

| | | | |
|---|---|---|---|
| No. 101 | BAL. FROM FWD | 15,222.70 | |
| August 10, 19 74 | | | |
| ORDER OF Standard Machinery Inc. | | | |
| FOR equipment | | | |
| $1,500- | 8/8 | 2,056.75 | |
| | TOTAL | 17,579.45 | |
| | AMOUNT THIS CHECK | 1,500.00 | |
| | BALANCE | 16,079.45 | |

| | | | |
|---|---|---|---|
| No. 102 | | | |
| August 10, 19 74 | | | |
| ORDER OF Covington Machine Co. | | | |
| FOR supplies | | | |
| $469- | 8/9 | 3,117.60 | |
| | TOTAL | 19,197.05 | |
| | AMOUNT THIS CHECK | 469.00 | |
| | BALANCE | 18,728.05 | |

| | | | |
|---|---|---|---|
| No. 103 | | | |
| August 10, 19 74 | | | |
| ORDER OF Amber Yarn Co. | | | |
| FOR Merchandise | | | |
| $1,500- | | | |
| | TOTAL | 18,728.05 | |
| | AMOUNT THIS CHECK | 1,500.00 | |
| | BALANCE | 17,228.05 | |

| | | | |
|---|---|---|---|
| No. 104 | BAL. FROM FWD | 17,228.05 | |
| August 10, 19 74 | | | |
| ORDER OF Knitters Sales Co. | | | |
| FOR merchandise | | | |
| $412.03 | | | |
| | TOTAL | 17,228.05 | |
| | AMOUNT THIS CHECK | 412.03 | |
| | BALANCE | 16,816.02 | |

| | | | |
|---|---|---|---|
| No. 105 | | | |
| August 12, 19 74 | | | |
| ORDER OF Carolina Transport Co. | | | |
| FOR freight | | | |
| 1,244.31 | | | |
| | TOTAL | 16,816.02 | |
| | AMOUNT THIS CHECK | 244.31 | |
| | BALANCE | 16,571.71 | |

| | | | |
|---|---|---|---|
| No. 106 | | | |
| August 10, 19 74 | | | |
| ORDER OF Duke Power Co. | | | |
| FOR utilities | | | |
| $1,499.41 | | | |
| | TOTAL | 16,571.71 | |
| | AMOUNT THIS CHECK | 1,499.41 | |
| | BALANCE | 15,072.30 | |

(U-3)

KEY

No. 107
August 10, 19 74
ORDER OF
Southwestern Bell Tel
FOR
Serv
$42.00

BAL. BROT FORD 15,012 30
DEPOSITS
TOTAL 15,012 30
AMOUNT THIS CHECK 42 00
BALANCE 14,150 30

No. 108
August 10, 19 74
ORDER OF
City of Burlington
FOR
water
$12.00

TOTAL 14,950 30
AMOUNT THIS CHECK 12 00
BALANCE 14,968 28

No. 109
August 10, 19 74
ORDER OF
Builders Office Supplies
FOR
supplies
$111.72

TOTAL 14,968 28
AMOUNT THIS CHECK 111 72
BALANCE 14,856 36

No. 110
August 10, 19 74
ORDER OF
Pine [illegible]
FOR
merchandise
$1,000 00

BAL. BROT FORD 14,856 36
DEPOSITS
TOTAL 14,856 36
AMOUNT THIS CHECK 1,000 39
BALANCE 13853 97

No. 111
August 10, 19 74
ORDER OF
Radio, Inc.
FOR
merchandise
$943.72

TOTAL 13,853 97
AMOUNT THIS CHECK 943 72
BALANCE 12,910 25

No. 112
August 10, 19 74
ORDER OF
Dale Curtis Inc
FOR
merchandise
$243.02

TOTAL 12,910 25
AMOUNT THIS CHECK 243 02
BALANCE 12667 23

TASK SIMULATION

Decision-Making

Situation: A female employee of a local branch bank has been promoted to Manager at a salary of $18,000 per year. Her husband is employed by the same bank at a salary of $12,000 per year.

Question: Who will claim the couple's four children as dependents?

Suggested Solutions:

The wife could claim the children as dependents with a net take home pay of $1,138.03. The husband's take home pay would be $747.70.

| Summary: | | |
|---|---|---|
| | Wife's net income | $1,138.03 |
| | Husband's net income | 747.70 |
| | Total take home pay | $1,885.73 |

The husband could claim the children as dependents with a net take home pay of $811.76. The wife's net take home pay would be $1,062.65.

| Summary: | | |
|---|---|---|
| | Husband's net income | $ 811.76 |
| | Wife's net income | 1,062.65 |
| | Total take home pay | $1,874.41 |

Special Notation: If the wife claims the children as dependents, the couple would have additional funds of $135.84 per year.

## TASK SIMULATION

### Invoice

Task: Calculate the amount to be paid on an invoice.

Procedure:

1. Check that Receiving Department has received all the merchandise listed on the invoice. (The invoice will have been stamped and initialed accordingly in that department.)

2. Figure the discount on merchandise total (excluding transportation charges).

3. Subtract the discount from the invoice total (including transportation charges).

4. Write on the invoice the amount of the discount and the amount to be paid, with your initials.

5. Place this invoice in your file folder marked: "Checks to be written _____." (final date of discount period)
This folder will be in a chronological file.

Trans. 12

# Legerton & Company, Inc.

263 Wingate Street
SALEM, STATE
53986

SOLD TO . State of North Carolina
Department of Public Education
Raleigh, North Carolina 27611

INVOICE NO. 436
October 1, 19X1
Terms: 2/10, n/30

| QUANTITY | DESCRIPTION | UNIT PRICE | AMOUNT |
|---|---|---|---|
| 1 | Desk, Executive, walnut, 30 x 60 | | 190 00 |
| 1 | Chair, Executive, swivel, w/arms | | 75 00 |
| 1 | Desk, Secretarial, walnut, 30 x 60 | | 155 00 |
| 1 | Chair, Secretarial posture | | 60 00 |
| 4 | Chairs, Side-arm | $32.50 | 130 00 |
| | | | $610 00 |
| | State Sales Tax | | 13 30 |
| | Total | | $623 30 |

APPROVED: A. S. 10/3/X1
PRICES O.K.: A. S.
EXTENSIONS O.K.:
ACCOUNT No.:
DATE PAID:
CHECK No.:

(1-2)

KEY

# Legerton & Company, Inc.

263 Wingate Street
SALEM, STATE
53986

SOLD TO . State of North Carolina
Department of Public Education
Raleigh, North Carolina 27611

INVOICE NO. 436
October 1, 19X1
Terms: 2/10, n/30

| QUANTITY | DESCRIPTION | UNIT PRICE | AMOUNT | |
|---|---|---|---|---|
| 1 | Desk, Executive, walnut, 30 x 60 | | 190 | 00 |
| 1 | Chair, Executive, swivel, w/arms | | 75 | 00 |
| 1 | Desk, Secretarial, walnut, 30 x 60 | | 155 | 00 |
| 1 | Chair, Secretarial posture | | 60 | 00 |
| 4 | Chairs, Side-arm | $32.50 | 130 | 00 |
| | | | $610 | 00 |
| | State Sales Tax | | 18 | 30 |
| | Total | | $628 | 30 |
| | | discount | 13 | 57 |
| | | Pay | (615 | 73) |

APPROVED: a.s. 10/3/X1
PRICES O.K.: a.s.
EXTENSIONS O.K.:
ACCOUNT No.:
DATE PAID:
CHECK No.:

a.s.

TASK SIMULATION

Perpetual Inventory Cards

Task: To make entries on perpetual inventory cards given the information from requisition forms and orders received.

Setting: You are employed as an inventory clerk in the supply department of a local firm. As supply requisitions are received from the various departments, you enter the amount in the appropriate column and reduce the inventory by that amount.

When your supply of a particular item reaches a reorder minimum, you place an order with a supplier for the item. As orders for additional supplies from outside companies are received, you enter the amount in the appropriate column and increase the inventory.

Equipment and Supplies Needed: Perpetual inventory cards
Pen
Adding machine or calculator (if available)

Procedures: Listed on the next sheet is the information from three (3) requisition forms and the information from two (2) orders received.

1. Make the appropriate entry on the perpetual inventory cards.

2. Make <u>one</u> of the following calculations:

   a. Subtract the amount requisitioned from the previous balance to get the new balance.

   <u>OR</u>

   b. Add the amount of the new order received to the previous balance to get the new balance.

3. Record the amount of the new balance on the perpetual inventory card.

| ARTICLE | | | | | | LOCATION | |
|---|---|---|---|---|---|---|---|
| | | | | | | AISLE | BIN |
| UNIT | STOCK NO. | PRICE | MAX. | MIN. | REORDER POINT | | |

| ORDERED | | | STOCK | | | | | |
|---|---|---|---|---|---|---|---|---|
| DATE | ORD. NO. | QUANTITY | DATE | REQ. NO. | ISSUED | RECEIVED | ORDER NO. | BALANCE |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

TRANSACTIONS INVOLVING INVENTORY

June 27 - June 30

June 27 Received Order No. 2042 for 24 dox. ruled white pads No. 118.

June 28 Issued 7 dozen ruled white pads No. 118, requisition No. 310.

June 29 Issued 15 steno pads No. 135, requisition No. 313.

June 29 Issued 23 typewriter ribbons No. 990, requisition No. 325.

June 30 Received Order No. 2051 for 36 typewriter ribbons No. 990.

(KEY)

ARTICLE Ruled white Pads (8½ x 11)

| UNIT | STOCK NO. | PRICE | MAX. | MIN. | REORDER POINT | LOCATION AISLE | LOCATION BIN |
|---|---|---|---|---|---|---|---|
| Dozen | 118 | $1.13 | 27 | 3 | 24 | L | 20 |

| ORDERED | | | STOCK | | | | | |
|---|---|---|---|---|---|---|---|---|
| DATE | ORD. NO. | QUANTITY | DATE | REQ. NO. | ISSUED | RECEIVED | ORDER NO. | BALANCE |
| | | | 6/1 | | | | | 27 |
| | | | 6/2 | 129 | 2 | | | 25 |
| 6/1 | 2042 | 24 | 6/11 | 213 | 10 | | | 15 |
| | | | 6/18 | 261 | 12 | | | 3 |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

(P-3)

KEY

ARTICLE Steno Pads

LOCATION: AISLE F | BIN 9

| UNIT | STOCK NO. | PRICE | MAX. | MIN. | REORDER POINT |
|---|---|---|---|---|---|
| Each | 135 | $0.12 | 180 | 36 | 144 |

| ORDERED | | | STOCK | | | | | |
|---|---|---|---|---|---|---|---|---|
| DATE | ORD. NO. | QUANTITY | DATE | REQ. NO. | ISSUED | RECEIVED | ORDER NO. | BALANCE |
| | | | 6/1 | | | | | 50 |
| | | | 6/3 | 138 | 12 | | | 38 |
| 6/6 | 2036 | 144 | 6/10 | 197 | 2 | | | 36 |
| | | | 6/18 | | | 144 | 2036 | 180 |
| | | | 6/25 | 296 | 24 | | | 156 |

ARTICLE Typewriter Ribbons

LOCATION: AISLE G | BIN 10

| UNIT | STOCK NO. | PRICE | MAX. | MIN. | REORDER POINT |
|---|---|---|---|---|---|
| Each | 990 | $0.84 | 48 | 12 | 36 |

| ORDERED | | | STOCK | | | | | |
|---|---|---|---|---|---|---|---|---|
| DATE | ORD. NO. | QUANTITY | DATE | REQ. NO. | ISSUED | RECEIVED | ORDER NO. | BALANCE |
| | | | 6/1 | | | | | 36 |
| 6/1 | 2031 | 36 | 6/4 | 152 | 14 | | | 22 |
| | | | 6/6 | 162 | 10 | | | 12 |
| | | | 6/10 | | | 36 | 2031 | 48 |
| 6/13 | 2043 | 36 | 6/15 | 224 | 16 | | | 32 |
| | | | 6/22 | 264 | 2 | | | 30 |
| | | | 6/22 | | | 36 | 2043 | 66 |
| 6/27 | 2051 | 36 | 6/27 | 301 | 17 | | | 49 |

KEY

ENDING BALANCES IN PERPETUAL INVENTORY

| | |
|---|---|
| Ruled white pads (8½ x 11), No. 118 | 20 |
| Steno Pads, No. 135 | 141 |
| Typewriter Ribbons, No. 990 | 62 |

TASK SIMULATION

Weekly Payroll

Name _____ Estimated Time _____

Date _____ Actual Time _____

Task: Preparation of a weekly payroll

Setting: Accounting clerk prepares payroll for a large manufacturing firm.

Steps:

1. Calculate hours worked on weekly time card for each employee.

2. Compute and total regular and/or overtime earnings on each time card. Check the Employee's Earnings Record for the rate. Each employee is due 1½ times his regular rate for each hour worked over 40. Working hours are from 8:00-5:00 daily for a regular work week Monday-Friday, with 1 hour for lunch, 12:00-1:00.

3. Using the Payroll Register, do the following:

   A. Enter regular hours worked, overtime hours worked, total hours worked, regular earnings, overtime earnings, and total earnings for the employees.

   B. Total the Regular Earnings column, the Overtime Earnings column, and the Total Earnings column. Prove the totals by adding the total of regular earnings and overtime earnings which should equal the total earnings column.

4. Using the Social Security Tax Table, determine the amount of FICA tax to be withheld from each employee's earnings. Record this amount in the FICA column of the Payroll Register.

5. Using the tax tables supplied with this task, compute the income tax to be withheld from the earnings of each employee. The number of exemptions to be considered is shown in the Employee's Earnings Record. Record in the Payroll Register the amount computed in the column headed "Inc. Tax".

6. Using the Employee's Earnings Record, compute other deductions by doing the following:

   A. The employee's portion of the cost of Hospitalization Insurance is deducted from the pay period that will include the 15th day of each month. Group Insurance is deducted from the last pay period of each month. Determine if either type of insurance is to be deducted from each employee's earnings for this pay period and record the amount to be deducted in proper insurance column of the Payroll Register.

   B. The entries in the "Other" column are coded as follows: B is used to identify amounts withheld for the purchase of U. S. Savings Bonds; UA is used to identify amounts withheld for contributions to the United Appeal; and U is used to identify amounts withheld for union dues. Determine the other deductions to be withheld from each employee's earnings for this pay period and record the amount in the "Other" column of the Payroll Register.

7. Compute total deductions and net pay in the Payroll Register by doing the following:

   A. Add the deductions across to find the total deductions for each employee. Enter this amount in the total deductions column.

   B. Subtract the total deductions from the total earnings to find the net pay and enter this amount in the net pay column.

8. Total all remaining columns of the Payroll Register. Prove the accuracy of your totals as follows:

   A. The sum of all deductions column totals added across should equal the total deductions column total.

   B. When the above totals are equal, subtract the total deductions from the total of the total earnings column. This figure should equal the total of the net pay column.

9. Record in each Employee's Earnings Record the information for this pay period from the Payroll Register.

10. Prepare the payment of the payroll for this week as follows:

    A. Write a voucher check for the amount of the net pay total, payable to Payroll Account, and sign your name as treasurer of the company.

    B. Prepare a payroll check for each employee for the amount of his net pay. Make the proper entries on the check stub, and on the summary stub at the top of each check. You are authorized to sign payroll checks for this company. Start numbering the payroll checks with No. 101.

11. Submit time cards, Payroll Register, Employee's Earnings Records, voucher check, and payroll checks to your instructor.

EMPLOYEE NO. 34

NAME Kevin O'Brian

SOC. SEC. NO. 164-63-6059

WEEK ENDING August 30, 1974

| | MORNING | | AFTERNOON | | OVERTIME | | HOURS | |
|---|---|---|---|---|---|---|---|---|
| | IN | OUT | IN | OUT | IN | OUT | REG | OT |
| M | 7:53 | 12:04 | 12:57 | 5:06 | | | | |
| TU | 7:58 | 12:00 | 12:59 | 5:04 | | | | |
| W | 8:00 | 12:02 | 1:00 | 5:03 | | | | |
| TH | 8:01 | 12:03 | 12:58 | 6:01 | | | | |
| F | 7:56 | 12:01 | 12:56 | 6:04 | | | | |
| S | 7:55 | 12:04 | | | | | | |
| | | | | | | | | |

| | HOURS | RATE | AMOUNT |
|---|---|---|---|
| REGULAR | | | |
| OVERTIME | | | |
| TOTAL HOURS | | TOTAL EARNINGS | |

EMPLOYEE NO. 37

NAME David Lamas

SOC. SEC. NO. 123-16-7048

WEEK ENDING August 30, 1974

| | MORNING | | AFTERNOON | | OVERTIME | | HOURS | |
|---|---|---|---|---|---|---|---|---|
| | IN | OUT | IN | OUT | IN | OUT | REG | OT |
| M | 8:00 | 12:03 | 12:57 | 5:04 | 5:59 | 8:32 | | |
| TU | 7:57 | 12:01 | 1:02 | 5:02 | | | | |
| W | 7:58 | 12:02 | 12:55 | 5:03 | | | | |
| TH | 8:00 | 12:01 | 12:57 | 5:06 | | | | |
| F | 7:57 | 12:04 | 12:58 | 5:02 | | | | |
| S | 7:56 | 12:03 | 12:54 | 5:02 | | | | |
| | | | | | | | | |

| | HOURS | RATE | AMOUNT |
|---|---|---|---|
| REGULAR | | | |
| OVERTIME | | | |
| TOTAL HOURS | | TOTAL EARNINGS | |

| Period Ending | EARNINGS | | | DEDUCTIONS | | | | | | NET PAY | Taxable Earnings Accumulated |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Regular | Overtime | Total | FICA Tax | Inc. Tax | Group Ins. | Hosp. | Other | TOTAL | Amount | |
| TOTALS Quar. | 2992 30 | 1304 20 | 10596 50 | 619 80 | 1377 45 | 30 00 | 84 00 | 35 00 | 2144 25 | 8452 25 | 10596 50 |
| 7/5 | 220 00 | 66 00 | 286 00 | 16 72 | 30 30 | | | 4 1 25 | 55 27 | 230 73 | 10827 22 |
| 7/12 | 220 00 | 82 50 | 302 50 | 17 70 | 42 10 | | | 11 1 25 | 61 05 | 241 45 | 11120 72 |
| 7/19 | 220 00 | 66 00 | 286 00 | 16 72 | 37 50 | | 14 00 | 4 1 25 | 69 27 | 216 73 | 11415 72 |
| 7/26 | 220 00 | | 220 00 | 12 87 | 22 10 | 5 00 | | 11 1 25 | 42 02 | 177 98 | 11635 72 |
| 8/2 | 220 00 | | 220 00 | 12 87 | 22 10 | | | 4 1 25 | 37 02 | 182 98 | 11855 72 |
| 8/9 | 220 00 | 82 50 | 302 50 | 17 70 | 42 10 | | | 4 1 25 | 61 05 | 241 45 | 12150 22 |
| 8/16 | 220 00 | 123 75 | 343 75 | 20 11 | 51 70 | | 14 00 | 4 1 25 | 66 95 | 276 80 | 12501 97 |
| 8/23 | 220 00 | | 220 00 | 12 87 | 22 10 | | | 4 1 25 | 37 02 | 182 98 | 12721 97 |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| QUARTER TOTALS | | | | | | | | | | | |
| YEARLY TOTALS | | | | | | | | | | | |

156

NAME David Lamas

ADDRESS 1349 Lindenhurst Dr

SOCIAL SECURITY NO. 123-11-7548

EMPLOYEE NO. 37

Rate @ 5.50

Withholding Exemptions 4(M)

Group Insurance 5.00 (mo)

Hospitalization 14.00 (mo)

Union Dues 1.25 (wk)

Savings Bonds

Union Agency

(P-4)

| Period Ending | EARNINGS | | | DEDUCTIONS | | | | | NET PAY | Taxable Earnings Accumulated |
|---|---|---|---|---|---|---|---|---|---|---|
| | Regular | Overtime | Total | FICA Tax | Inc. Tax | Group Ins. | Hosp. | Other | TOTAL | Amount | |
| TOTALS Quar. | 9045 10 | 455 20 | 9500 30 | 555 77 | 1339 20 | | 51 00 | 140 00 | 2135 07 | 7414 23 | 9500 00 |
| 7/5 | 188 00 | | 188 00 | 10 91 | 30 04 | | | 5 00 U 1 25 | 46 04 | 139 91 | 9688 30 |
| 7/12 | 188 00 | | 188 00 | 10 99 | 30 99 | | | 5 00 U 1 25 | 47 24 | 130 01 | 9876 30 |
| 7/19 | 188 00 | 28 20 | 216 20 | 12 65 | 37 10 | | 9 60 | 5 00 U 1 25 | 64 50 | 151 70 | 10092 50 |
| 7/26 | 188 00 | 14 10 | 202 10 | 11 82 | 35 00 | | | 5 00 U 1 25 | 53 07 | 149 03 | 10241 53 |
| 8/2 | 188 00 | | 188 00 | 10 99 | 30 99 | | | 5 00 U 1 25 | 48 24 | 139 76 | 10430 53 |
| 8/9 | 188 00 | 28 20 | 216 20 | 12 65 | 37 10 | | | 5 00 U 1 25 | 56 00 | 160 20 | 10645 73 |
| 8/16 | 188 00 | | 188 00 | 10 99 | 30 99 | | 9 60 | 5 00 U 1 25 | 58 24 | 129 76 | 10833 73 |
| 8/23 | 195 00 | 14 00 | 209 00 | 11 82 | 35 00 | | | 5 00 U 1 25 | 53 07 | 155 93 | 11055 93 |
| QUARTER TOTALS | | | | | | | | | | | |
| YEARLY TOTALS | | | | | | | | | | | |

157

NAME Kevin O'Brian

ADDRESS 427 Evergreen Ln.

SOCIAL SECURITY NO. 164-62-4059

EMPLOYEE NO. 24

Rate 14.70

Withholding Exemptions 1 (S)

Group Insurance

Hospitalization 8.50 (10c)

Union Dues 1.25 (wk)

Savings Bonds 5.00 (wk)

United Appeal

(P-4)

NAME Kevin O'Brian

SOC. SEC. NO. 164-63-6059

WEEK ENDING August 30, 1974

| | MORNING IN | MORNING OUT | AFTERNOON IN | AFTERNOON OUT | OVERTIME IN | OVERTIME OUT | HOURS REG | HOURS OT |
|---|---|---|---|---|---|---|---|---|
| M | 7:53 | 12:04 | 12:57 | 5:06 | | | 8 | |
| TU | 7:58 | 12:00 | 12:59 | 5:04 | | | 8 | |
| W | 8:00 | 12:02 | 1:00 | 5:03 | | | 8 | |
| TH | 8:01 | 12:03 | 12:58 | 6:01 | | | 8 | 1 |
| F | 7:56 | 12:01 | 12:56 | 6:04 | | | 8 | 1 |
| S | 7:55 | 12:04 | | | | | | 4 |

| | HOURS | RATE | AMOUNT |
|---|---|---|---|
| REGULAR | 40 | 4.70 | 188.00 |
| OVERTIME | 6 | 7.05 | 42.30 |
| TOTAL HOURS | 46 | TOTAL EARNINGS | 230.30 |

EMPLOYEE NO. 37

NAME David Lamas

SOC. SEC. NO. 123-16-7048

WEEK ENDING August 30, 1974

| | MORNING IN | MORNING OUT | AFTERNOON IN | AFTERNOON OUT | OVERTIME IN | OVERTIME OUT | HOURS REG | HOURS OT |
|---|---|---|---|---|---|---|---|---|
| M | 8:00 | 12:03 | 12:57 | 5:04 | 5:5[illegible] | 8:32 | 8 | 2½ |
| TU | 7:57 | 12:01 | 1:02 | 5:02 | | | 8 | |
| W | 7:58 | 12:02 | 12:55 | 5:03 | | | 8 | |
| TH | 8:00 | 12:01 | 12:57 | 5:06 | | | 8 | |
| F | 7:57 | 12:04 | 12:58 | 5:02 | | | 8 | |
| S | 7:56 | 12:03 | 12:54 | 5:02 | | | | 8 |

| | HOURS | RATE | AMOUNT |
|---|---|---|---|
| REGULAR | 40 | 5.50 | 220.00 |
| OVERTIME | 10½ | 8.25 | 86.63 |
| TOTAL HOURS | 50½ | TOTAL EARNINGS | 306.63 |

(P-4)
KEY

# PAYROLL REGISTER

WEEK ENDING August 30, 1974

DATE PAID August 25, 1974

| No. | NAME OF EMPLOYEE | M or S | Ex. | HOURS WORKED Reg. | O. T. | Tot | EARNINGS Regular | Overtime | Total | DEDUCTIONS FICA Tax | Inc. Tax | Group Ins. | Hosp. | Other | Total Deductions | NET PAY Amount | Ck. No. |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 24 | Kevin O'Brian | M | 1 | 40 | 10½ | 50½ | 220 00 | 86 63 | 306 63 | 17 94 | 42 10 | 5 00 | | 11 25 | 76 29 | 230 34 | 102 |
| 37 | David Lamas | M | 1 | 40 | 6 | 46 | 188 00 | 42 30 | 230 30 | 13 47 | 41 60 | | | 5 00 | 60 07 | 170 23 | 101 |
| TOTALS | | | | | | | 408 00 | 128 93 | 536 93 | 31 41 | 83 70 | 5 00 | | 16 25 | 136 36 | 400 57 | |

| Period Ending | EARNINGS | | | DEDUCTIONS | | | | | | NET PAY | Taxable Earnings Accumulated |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Regular | Overtime | Total | FICA Tax | Inc. Tax | Group Ins. | Hosp. | Other | TOTAL | Amount | |
| TOTALS Quar. | 7045 10 | 455 20 | 6500 30 | 565 77 | 1339 20 | | 51 00 | 140 00 | 2185 47 | 4314 33 | 9500 00 |
| 7/5 | 188 00 | | 188 00 | 10 64 | 30 96 | | | Dues 1 25 | 42 11 | 139 91 | 9688 30 |
| 7/12 | 188 00 | | 188 00 | 10 99 | 30 60 | | | S 5 00 U 1 25 | 42 84 | 139 91 | 9876 30 |
| 7/19 | 188 00 | 28 20 | 216 20 | 12 65 | 37 10 | | 9 51 | B 5 00 U 1 25 | 64 51 | 151 70 | 10092 50 |
| 7/26 | 189 40 | 14 10 | 202 10 | 11 82 | 35 00 | | | B 5 00 U 1 25 | 53 07 | 149 03 | 10241 53 |
| 8/2 | 188 00 | | 188 00 | 10 99 | 30 60 | | | B 5 00 U 1 25 | 42 84 | 139 91 | 10429 53 |
| 8/9 | 185 00 | 28 20 | 214 20 | 12 65 | 37 10 | | | B 5 00 U 1 25 | 56 00 | 144 80 | 10645 73 |
| 8/16 | 188 00 | | 188 00 | 10 99 | 30 60 | | 8 50 | B 5 00 U 1 25 | 56 34 | 131 66 | 10837 73 |
| 8/23 | 188 00 | 14 10 | 202 10 | 11 82 | 35 00 | | | B 5 00 U 1 25 | 53 07 | 149 03 | 11039 83 |
| 8/30 | 188 00 | 42 30 | 230 30 | 13 47 | 41 00 | | | B 5 00 U 1 25 | 61 22 | 169 08 | 11269 13 |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| QUARTER TOTALS | | | | | | | | | | | |
| YEARLY TOTALS | | | | | | | | | | | |

159

NAME Lisa O'Brien

ADDRESS 427 Evergreen Dr.

SOCIAL SECURITY NO. 164-63-6059

EMPLOYEE NO. 24

Rate $4.70

Withholding Exemptions 1 (S)

Group Insurance

Hospitalization 8.50 (MF)

Union Dues 1.25 (wk)

Savings Bonds 5.00 (wk)

Net of Journal

(P-4)

KEY

| Period Ending | EARNINGS | | | DEDUCTIONS | | | | | | NET PAY | Taxable Earnings Accumulated |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Regular | Overtime | Total | FICA Tax | Inc. Tax | Group Ins. | Hosp. | Other | TOTAL | Amount | |
| TOTALS Quar. | 2292 30 | 1304 20 | 10596 50 | 619 70 | 1377 45 | 30 00 | 84 00 | 25 00 | 2134 65 | 8450 25 | 10596 50 |
| 7/5 | 220 00 | 66 03 | 286 03 | 16 73 | 37 30 | | | 1 25 | 55 28 | 230 02 | 10827 22 |
| 7/12 | 220 00 | 82 50 | 302 50 | 17 70 | 42 10 | | | 1 25 | 61 05 | 241 45 | 11129 72 |
| 7/19 | 220 00 | 66 00 | 286 00 | 16 73 | 37 30 | | 14 00 | 1 25 | 69 28 | 216 72 | 11415 72 |
| 7/26 | 220 00 | | 220 00 | 12 87 | 32 50 | 5 00 | | 1 25 | 51 62 | 168 38 | 11635 72 |
| 8/2 | 220 00 | | 220 00 | 12 87 | 32 50 | | | 1 25 | 46 62 | 173 38 | 11855 72 |
| 8/9 | 220 00 | 82 50 | 302 50 | 17 70 | 42 10 | | | 1 25 | 61 05 | 241 45 | 12158 22 |
| 8/16 | 220 00 | 123 75 | 343 75 | 20 11 | 51 70 | | 14 00 | 1 25 | 66 95 | 276 80 | 12501 97 |
| 8/23 | 220 00 | | 220 00 | 12 87 | 32 50 | | | 1 25 | 46 62 | 173 38 | 12721 97 |
| 8/30 | 220 00 | 86 63 | 306 63 | 17 94 | 42 10 | 5 00 | | 1 25 | 66 29 | 240 34 | 13009 60 |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| QUARTER TOTALS | | | | | | | | | | | |
| YEARLY TOTALS | | | | | | | | | | | |

NAME Linda Lewis

ADDRESS 1340 Creek Drive

SOCIAL SECURITY NO. 123-16-7148

EMPLOYEE NO. 37

Rate $5.50

Withholding Exemptions 4 (M)

Group Insurance 5.00 (mo)

Hospitalization 14.00 (mo)

Union Dues 1.25 (wk)

Savings Bonds

United Appeal

KEY

(P-4)

Teacher's Key

Crown Toy Company

901 Fifth Street, Davis, California 93612

No 451

1210

August 28, 1974

PAY FOUR HUNDRED NINE AND 32/100********** DOLLARS $ 409.32/100

PAYROLL ACCOUNT

Crown Toy Company

Citizens National Bank

Missy Student

| DATE | DESCRIPTION | AMOUNT | DISCOUNT | OTHER DEDUCTIONS | AMOUNT PAID |
|---|---|---|---|---|---|
| 8/28 | Weekly Payroll | 409.32 | | | 409.32 |

Teacher's Key

Balance Brought Forward

Deposit, 8/28 (date) 409 32

Total 409 32

No. 101
Date 8/28 19 74
To Kevin O'Brien
For Payroll

Amount 168 98

Balance Carried Forward 240 34

PERIOD ENDING | EARNINGS REG. | O.T. | TOTAL | DEDUCTIONS FICA | FWT | SDI | MED. | OTHER | TOTAL | NET PAY AMOUNT | CHECK NO.
8/30 | 220 | 20 | 34 | 47 | 9 | 6 | 3 | 2 | 3 | 24 | 168 98 | 101

No. 101 Citizens National Bank

Clovis, California August 28, 19 74 92-61 1210

PAY TO THE ORDER OF KEVIN O'BRIEN $ 168.98

For use in payroll

ONE HUNDRED SIXTY-EIGHT AND 98/100 DOLLARS

Crown Toy Company - Payroll Account

Mary Student

⑈101⑈ ⑆321004⑆ 482⑈5592⑈

Teacher's Key

Balance Brought Forward 240 34

Deposit, (date)

Total 240 34

No. 102
Date 8/28 19 74
To David James
For Payroll

Amount 240 34

Balance Carried Forward ------

PERIOD ENDING | EARNINGS REG. | O.T. | TOTAL | DEDUCTIONS FICA | FWT | SDI | MED. | OTHER | TOTAL | NET PAY AMOUNT | CHECK NO.
8/30 | 320 | 28 | 34 | 47 | 9 | 6 | 3 | 2 | 3 | 24 | 240 34 | 102

No. 102 Citizens National Bank

Clovis, California August 28, 19 74 92-61 1210

PAY TO THE ORDER OF DAVID JAMES $ 240.34

For use in payroll

TWO HUNDRED FORTY AND 34/100 DOLLARS

Crown Toy Company - Payroll Account

Mary Student

⑈102⑈ ⑆321004⑆ 482⑈5592⑈

TASK SIMULATION

Employee's Earning Record

Name _____ Estimated Time _____

Date _____ Actual Time _____

Task: Using a ballpoint or ink pen, prepare an employee's earning record for each employee by posting gross salaries, deductions, and net pay from the payroll register.

Setting: Answering Service Office in a modern downtown office building.

Assumptions: The student's handwriting is legible.

The student has completed one year of bookkeeping, and has performed various bookkeeping duties through the use of a practice set.

Materials Needed: Payroll register
Employee's earning record
Ink or ballpoint pen

Procedures:

1. Obtains payroll register from the storage cabinet.
2. Obtains employee's earning register from the storage cabinet.
3. Obtains additional payroll earnings sheets, if necessary, from desk drawer.
4. Prepare an employee's earnings record for each employee for the month of June. Do not total the columns.
5. Check each entry for accuracy.
6. Place completed employee's earnings records on the desk of the manager, and return the payroll register to the storage cabinet.

PAYROLL REGISTER Pay Period Ending 6 - 7-

| Employee No. | Name | Marital Status | No. of Exemptions | Total Earnings | FICA Tax | Fed. Inc. Tax | State Inc Tax | Other | Total | Net Pay |
|---|---|---|---|---|---|---|---|---|---|---|
| 112 | [illegible] | 1 | 2 | 350.00 | 21.00 | 40.90 | 7.00 | 0 | 69.90 | 280. |
| 113 | [illegible] | 3 | 3 | 310.00 | 22.00 | 30.00 | 5.00 | 0 | 57.00 | 253. |
| 114 | [illegible] | 1 | 5 | 400.00 | 25.00 | 20.00 | 5.00 | 0 | 50.00 | 350. |
| 115 | [illegible] | 1 | 6 | 600.00 | 40.00 | 20.00 | 5.00 | 0 | 65.00 | 535. |

PAYROLL REGISTER Pay Period Ending 6 -14-

| Employee No. | Name | Marital Status | No. of Exemptions | Total Earnings | FICA Tax | Fed. Inc. Tax | State Inc Tax | Other | Total | Net Pay |
|---|---|---|---|---|---|---|---|---|---|---|
| 112 | [illegible] | 1 | 2 | 300.00 | 20.00 | 47.40 | 7.00 | 0 | 67.40 | 232. |
| 113 | [illegible] | 3 | 3 | 310.00 | 22.00 | 30.00 | 5.00 | 0 | 57.00 | 253. |
| 114 | [illegible] | 1 | 5 | 400.00 | 25.00 | 20.00 | 5.00 | 0 | 50.00 | 350. |
| 115 | [illegible] | 1 | 6 | 600.00 | 40.00 | 20.00 | 5.00 | 0 | 65.00 | 535. |

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EMPLOYEE'S EARNINGS RECORD FOR QUARTER ENDING (Current)

Marital Status Time Card No.

Exemptions Soc. Sec. No.

Position

Last Name First Middle Initial

| Pay Period Week Ended | Total Earnings | FICA Tax | Fed. Income Tax | State Income Tax | Other | Total | Net Pay | Accumulated Earnings |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | |
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| | | | | | | | | |
| Quarterly Totals | | | | | | | | |

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KEY

EMPLOYEE'S EARNINGS RECORD FOR QUARTER ENDING (Current)

Marital Status 1 Time Card No. 112

Exemptions 1 Soc. Sec. No. 059-32-4227

Position Bookkeeper

Baker Mary E

Last Name First Middle Initial

| Pay Period Week Ended | Total Earnings | FICA Tax | Fed. Income Tax | State Income Tax | Other | Total | Net Pay | Accumulated Earnings |
|---|---|---|---|---|---|---|---|---|
| 6-7-74 | 350.00 | 22.00 | 40.90 | 7.00 | 0 | 69.90 | 280.10 | 350.00 |
| 6-14-74 | 300.00 | 20.00 | 40.40 | 7.00 | 0 | 67.40 | 232.60 | 650.00 |
| | | | | | | | | |
| | | | | | | | | |
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| | | | | | | | | |
| | | | | | | | | |
| Quarterly Totals | | | | | | | | |

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TASK SIMULATION

General Ledger

Name _____ Estimated Time _____

Date _____ Actual Time _____

Task: Prepares trial balance of general ledger.

Setting: Accounting clerk prepares trial balance in accounting department of Treadway Realty Agency on October 31, 1971.

Materials Needed: General ledger

Steps:

1. Receives footed general ledger.
2. Write heading centered on top three lines:
   a. Write the name of the company on the first line.
   b. Write "Trial Balance" on the second line.
   c. Write the day, month, and year for which the trial balance is prepared on the third line.
3. Beginning on the first line under the heading even with the left margin, list the first account in the general ledger that has a balance.
4. In the second column, write the account number.
5. If the account has a debit balance, list it in the third column; if the account has a credit balance, list it in the fourth column.
6. List all accounts with balances on the form following steps 3, 4, and 5.
7. Rule a single line across both amount columns under the last amount listed.
8. Add each column.
9. If the two totals are the same, write the totals on the first line below the single ruling.
10. If the totals are not the same, find your error and correct it.
11. Rule a double line under the totals across the amount columns.

Cash — ACCOUNT NO. 11

| DATE | EXPLANATION | POST. REF. | DEBIT | DATE | EXPLANATION | POST. REF. | CREDIT |
|---|---|---|---|---|---|---|---|
| Oct 1 | Balance | J1 | 2211 47 | Oct 31 | | C2 | 1294 35 |
| 31 | | C2 | 55 20 | | | | |
| | 1,795 37 | | 1795 37 | | | | |

Automobile — ACCOUNT NO. 12

| DATE | EXPLANATION | POST. REF. | DEBIT | DATE | EXPLANATION | POST. REF. | CREDIT |
|---|---|---|---|---|---|---|---|
| Oct 1 | Balance | J1 | 2970 00 | | | | |

Office Equipment — ACCOUNT NO. 13

| DATE | EXPLANATION | POST. REF. | DEBIT | DATE | EXPLANATION | POST. REF. | CREDIT |
|---|---|---|---|---|---|---|---|
| Oct 1 | Balance | J1 | 1172 14 | | | | |
| 5 | | C1 | 60 00 | | | | |
| 25 | | C2 | 65 21 | | | | |
| | | | 1297 35 | | | | |

Office Furniture — ACCOUNT NO. 14

| DATE | EXPLANATION | POST. REF. | DEBIT | DATE | EXPLANATION | POST. REF. | CREDIT |
|---|---|---|---|---|---|---|---|
| Oct 1 | Balance | J1 | 550 00 | Oct 16 | | C1 | 45 00 |
| 22 | | C1 | 75 00 | | | | |
| | 550 00 | | 625 00 | | | | |

Jackson and King — ACCOUNT NO. 21

| DATE | EXPLANATION | POST. REF. | DEBIT | DATE | EXPLANATION | POST. REF. | CREDIT |
|---|---|---|---|---|---|---|---|
| Oct 11 | | C1 | 126 14 | Oct 1 | Balance | J1 | 556 14 |
| 22 | | C1 | 100 00 | | | | |
| | | | 226 14 | | | | 556 14 |

Martin Company ACCOUNT NO 22

| DATE | EXPLANATION | POST. REF. | DEBIT | DATE | EXPLANATION | POST. REF. | CREDIT |
|---|---|---|---|---|---|---|---|
| Oct 10 | | C1 | 175 00 | Oct 1 | Balance | ✓ | 36 48 |
| 25 | | C1 | 100 00 | | | | |
| | | | 275 00 | | | | 85 48 |

C. W. Treadway, Capital ACCOUNT NO 31

| DATE | EXPLANATION | POST. REF. | DEBIT | DATE | EXPLANATION | POST. REF. | CREDIT |
|---|---|---|---|---|---|---|---|
| | | | | Oct 1 | Balance | ✓ | 568 99 |

Commissions Income ACCOUNT NO 41

| DATE | EXPLANATION | POST. REF. | DEBIT | DATE | EXPLANATION | POST. REF. | CREDIT |
|---|---|---|---|---|---|---|---|
| | | | | Oct 31 | | C2 | 211 10 |

Advertising Expense ACCOUNT NO 51

| DATE | EXPLANATION | POST. REF. | DEBIT | DATE | EXPLANATION | POST. REF. | CREDIT |
|---|---|---|---|---|---|---|---|
| Oct 10 | | C1 | 45 50 | | | | |
| 31 | | C2 | 25 10 | | | | |
| | | | 70 60 | | | | |

Automobile Expense ACCOUNT NO 52

| DATE | EXPLANATION | POST. REF. | DEBIT | DATE | EXPLANATION | POST. REF. | CREDIT |
|---|---|---|---|---|---|---|---|
| Oct 15 | | C1 | 26 50 | | | | |
| 31 | | C2 | 18 30 | | | | |
| | | | 45 80 | | | | |

Miscellaneous Expense ACCOUNT NO. 53

| DATE | EXPLANATION | POST. REF. | DEBIT | DATE | EXPLANATION | POST. REF. | CREDIT |
|---|---|---|---|---|---|---|---|
| [illegible] 16 | | C1 | 17 64 | | | | |
| 31 | | C2 | 36 81 | | | | |
| | | | 54 45 | | | | |

Rent Expense ACCOUNT NO. 54

| DATE | EXPLANATION | POST. REF. | DEBIT | DATE | EXPLANATION | POST. REF. | CREDIT |
|---|---|---|---|---|---|---|---|
| [illegible] 31 | | C2 | 150 00 | | | | |

Stationery Expense ACCOUNT NO. 55

| DATE | EXPLANATION | POST. REF. | DEBIT | DATE | EXPLANATION | POST. REF. | CREDIT |
|---|---|---|---|---|---|---|---|
| [illegible] 3 | | C1 | 5 10 | | | | |
| 2 | | C2 | 14 30 | | | | |
| | | | 19 40 | | | | |

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KEY

# Treadway Realty Agency
## Trial Balance
## October 31, 1971

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| Acct. No. | | | |
|---|---|---|---|
| 11 | Cash | 1 79 8 37 | |
| 12 | Automobile | 2 97 0 00 | |
| 13 | Office Equipment | 1 29 7 35 | |
| 14 | Office Furniture | 58 0 00 | |
| | Jackson and King | | 6 30 00 |
| 22 | Martin Company | | 85 48 |
| 31 | C. W. Treadway, Capital | | 5 65 6 99 |
| 41 | Commissions Income | | 8 97 10 |
| 51 | Advertising Expense | 25 3 09 | |
| 52 | Automobile Expense | 20 8 91 | |
| 53 | Miscellaneous Expense | 5 4 45 | |
| 54 | Rent Expense | 1 25 0 00 | |
| 55 | Stationery Expense | 1 2 40 | |
| | | 7 29 9 57 | 7 29 9 57 |

TASK SIMULATION

Income Statement

Name _____

Date _____

Task: Prepares income statement from worksheet.

Setting: Accounting clerk prepares an income statement in the accounting department.

Steps:

1. Write the heading centered on two-columnar analysis paper.
   a. First line: name of company
   b. Second line: the words "Income Statement"
   c. Third line: write date as it appears on the worksheet including the fiscal period
2. On the first line beginning at the vertical line at the left, write the word "Income".
3. On the second line, indent one-half inch and write the title of the income account.
4. Write the amount of the income in the second amount column.
5. On the third line beginning at the vertical line at the left, write the word "Expenses".
6. On the fourth line, write the name of the first expense account as it appears on the worksheet, indented one-half inch from the vertical line.
7. Write the amount of this expense account in the first amount column on the same line as the name of the account.
8. List all expense accounts with balances following steps 6 and 7.
9. Draw a single line across the first amount column.
10. Write the words "Total Expenses" under the last expense account.

11. Add the amount of the expenses and write the total in the second amount column on the line entitled "Total Expenses".

12. Draw a single line across the second amount column.

13. If income is larger than expenses:

    a. Subtract total expenses from income and record the amount on the next line.
    b. Write "Ne Income" even with vertical line at the left.

14. If the total expenses are larger than the income:

    a. Subtract income from total expenses and record the amount on the next line.
    b. Write "Net Loss" even with the vertical line at the left.

15. Rule a double line across both the amount columns.

Work sheet for an advertising agency

# Marks Advertising Agency
## Work Sheet
### For Month Ended March 31, 19--

| ACCOUNT TITLE | ACCT. NO. | TRIAL BALANCE DEBIT | TRIAL BALANCE CREDIT | INCOME STATEMENT DEBIT | INCOME STATEMENT CREDIT | BALANCE SHEET DEBIT | BALANCE SHEET CREDIT |
|---|---|---|---|---|---|---|---|
| Cash | 11 | 29240 | | | | 29240 | |
| Office Supplies | 12 | 1640 | | | | 1640 | |
| Automobile | 13 | 33400 | | | | 33400 | |
| Office Furniture | 14 | 8675 | | | | 8675 | |
| Office Machines | 15 | 6102 | | | | 6102 | |
| Notes Payable | 21 | | 1250 | | | | 1250 |
| Mark's Capital | 22 | | 7100 | | | | 7100 |
| Mark's Drawing | 23 | | 24350 | | | | 24350 |
| Art Works Capital | 31 | | 669100 | | | | 669100 |
| Fees Earned | 41 | | 133900 | | 133900 | | |
| Automobile Expenses | 51 | 1648 | | 1648 | | | |
| Entertainment Expenses | 52 | 600 | | 600 | | | |
| Miscellaneous Expenses | 53 | 320 | | 320 | | | |
| Rent Expense | 54 | 2000 | | 2000 | | | |
| Salaries Expense | 55 | 5296 | | 5296 | | | |
| | | 811830 | 811830 | 51260 | 133900 | 79057 | 702930 |
| Net Income | | | | 82640 | | | 82640 |
| | | | | 133900 | 133900 | 79057 | 79057 |

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KEY

# MARKS ADVERTISING AGENCY

## INCOME STATEMENT

### FOR MONTH ENDED MARCH 31, 1974

| | | |
|---|---|---|
| Income: | | |
| Fees Income | | 1389000 |
| Expenses: | | |
| Automobile expense | 16480 | |
| Entertainment Expense | 20000 | |
| Miscellaneous Expense | 3820 | |
| Rent Expense | 200000 | |
| Utilities Expense | 89760 | |
| Total Expenses | | 512060 |
| Net Income | | 876940 |

# A ROLE-PLAYING SITUATION

Behavioral Objective: Given a situation, the students will participate in a role-playing simulation and arrive at an acceptable solution. Evaluation will be by teacher judgment after a general discussion by the class.

Introduction of Situation:

Jane Robinson is a receptionist-typist in her first full-time job for a company that sells office equipment and supplies. Her duties include greeting all callers, answering the telephone and routing calls to all departments. She is directly responsible to the manager of the service department, Mr. Jones, and does his typing and takes messages about all service calls. She is to make notes of the nature of the repairs needed, and deliver the message promptly to the service department manager's desk. In her office procedures manual the importance of the telephone to the company is stressed, and it explicitly states that the telephone is for business use only--except for emergencies.

The Incident:

Jane is at work during her first month of employment. The service manager, Mr. Jones, suddenly appears at her desk, obviously not in a good mood. He tells Jane that at lunch he was asked by a good friend and customer why the repairman had not yet come to answer an early morning request for service on a photo-copy machine that had been termed an emergency. He said that the other servicemen have no knowledge of the call. Just then the telephone rings and when Jane answers the telephone she realizes that it is her fiance on the phone, also obviously not in a good mood.

For the Teacher:

The class should be introduced to role-playing gradually. One way to do this is to give the students an assignment to write a script in partnership with another class member and present it before the class without the use of notes. Be prepared for giggles!

After the stage has been set for the unrehearsed simulation, you may wish to give the participants a little time to clarify roles, discuss briefly the problem, and plan their strategy for arriving at a solution.

At the end of the simulation, the students should discuss the scene and make suggestions for improvement, develop alternative solutions, and possibly replay the roles using the improved solution as a reinforcement of learning.

Some questions to ask of the class during this discussion might be:

1. Was the problem resolved in this situation?
2. If so, what was the solution?
3. Can you think of other solutions?
4. Why are they appropriate solutions? Give your reasons.
5. Finally, ask the students in writing to give what they think they actually would have done in a real situation similar to this one.

# CASE PROBLEMS

Objective: The purpose of this is to acquaint students with the knowledge of analyzing case problems and being able to come up with logical solutions.

Situation:

Palmetto State Life Insurance Company has two secretaries working for them. An elderly executive secretary, Mrs. Katzman, who's been with the company for fifteen years, and a younger secretary, Mrs. Peay, who's been with the company for only one year. Mrs. Peay, after eleven months with the company has been promoted to assistant executive secretary. The executive secretary becomes furious and begins to feel that because of her age the younger secretary will soon get the position she now holds. She sticks pressure to her assistant and overworks her until she's a nervous wreck. The assistant decides after a long period of time to take some form of action in solving this problem because her job is causing her many problems at home.

Discussion Questions:

1. What could the assistant do in solving her problem?
2. Would she go to the executive secretary to try to resolve her problem?
3. Would going to the manager be a better approach for her to use?
4. If you were Mrs. Peay, the assistant, what would you do?

Suggested Solutions:

Mrs. Peay, the assistant, could arrange a meeting with the manager and discuss the problem with him, and in return ask him to speak with Mrs. Katzman, the executive secretary in hopes that he will be able to solve the problem. If anything should happen to upset matters worse, then it would be up to the manager to decide what to do.

CASE PROBLEM

An Odor for an Odor

The Situation: Often in a large office the employees are very close to each other in terms of floor space. When one wears a high fragrance or odor, the others suffer. In this case Alyce has failed to use deodorant for two consecutive days. During lunch on the second day the other five girls complained loudly to their immediate supervisor who had just returned from sick leave.

For Discussion:

1. Should one of the girls take Alyce in privacy and mention the problem?

2. Should someone bring a bottle of deodorant and place it on her desk?

3. Should Alyce be told of her body odor at all?

Suggested Solutions:

1. One of the girls should have been close enough to Alyce to speak to her by offering her some deodorant.

2. Why use the coward method of putting deodorant on the desk unless of course the person is not easy to approach.

3. Alyce definitely should have been informed even on the first day.

Variations: Use a person who wears excessive perfume.

# CASE STUDY

Objective: In a given situation, the student will be able to analyze office behavior and will realize the importance of the drawing out of ideas, beliefs, and attitudes of other students so that each student may help the others in the construction of a proper outlook upon office behavior.

The Situation:

Mr. Walton is leaving on a two-week trip to the West Coast to visit the various branches of the company. His secretary, Betty Simpson, has carefully worked out his air transportation, hotel reservations, and appointments.

Two days before scheduled departure, Mr. Walton changes his plans for one day and throws the whole itinerary out of balance. Marjorie Foss, a stenographer in the office, thinks Mr. Walton is inconsiderate, but sees that Betty has two courses of action open to her:

1. Make the changes in the itinerary, or

2. Leave the itinerary as it was originally planned and let Mr. Walton work out his own changes.

For Discussion:

1. What would you do if you were in Betty's place?

2. What must Marjorie learn before she moves from her stenographer's position to that of a secretary?

Suggested Solution:

Betty should make the necessary changes in Mr. Walton's West Coast itinerary. In all probability, Mr. Walton has very valid reasons for changing his plans for a day. Furthermore, the plans may have been changed for reasons beyond his control such as the abrupt closing of one of the West Coast branches.

Marjorie must learn that she will have to be more accomodating and less rigid if she is to advance from the position of stenographer to secretary. If she knew all the reasons for the change, she might not think that Mr. Walton is acting inconsiderately. Moreover, in this emergency, two days before his scheduled departure, Mr. Walton needs a great deal of help with his itinerary, possibly help that may keep Betty at her desk after regular office hours. As a rule, such help in an emergency is appreciated by an executive and not lost to him.

# CASE STUDY

The Situation:

Ann has worked for a large firm as the secretary to the manager of the Payroll Department for two months. She often takes her coffee break each morning with some of the other secretaries. The conversation usually concerns the sale at a local store, children, weather, or week-end plans.

One morning Helen, one of the other secretaries, announces that she has heard that all employees will get a 15¢ an hour raise during the next month. As Ann's employer handles all information concerning raises, she knows that a raise of 12¢ an hour has been approved by the management; but the announcement is not going to be made until the first of next week.

As Helen and Ann are walking back to their offices, Helen asks her if the information is correct. Ann does not think that Helen would tell anyone if she told her in confidence, and no one else is with them. Although much of the work in Ann's department, such as individual salaries, is confidential, no one has ever told her not to discuss raises.

What should Ann do?

Questions for Discussion:

1. Do you think Helen should have mentioned the raise?
2. Should Ann have offered a reply when Helen first mentioned the raise at break?
3. Should Ann mention to her employer that the information has been circulating around the company?
4. What reply can Ann give Helen if she does not tell her about the raise?

Possible Solution:

Ann should tell Helen that she is not supposed to discuss the subject of raises outside her department. If Helen brought the subject of raises up in front of other people, she just might mention it again. Ann should, however, tell her employer that she heard some workers discussing the proposed raise, but she should not give names. She might ask her employer if the subject is confidential.

CASE PROBLEM

Decision-Making Task

Characters: Mr. Landon Johnson, Salesman
Mr. Grant Morrow, Executive
Miss Iris Jones, Secretary

Situation:

Mr. Landon Johnson, of the Tri-City Investment Company, has called at the office three times within the past month to sell Mr. Grant Morrow some bonds. The last time Mr. Johnson called, Mr. Morrow told him that he could not afford to purchase any bonds. The executive, Mr. Morrow, tells his secretary, Miss Jones, that he does not want to talk to Mr. Johnson again concerning this matter of bonds; however, Mr. Johnson comes in a fourth time to talk to Mr. Morrow about the bonds.

Questions:

1. What will Miss Jones tell Mr. Johnson when he visits the office for a fourth time?

2. Doesn't Mr. Johnson seem a bit pushy in selling his bonds? Or is he a good salesman?

3. What can Mr. Morrow do to avoid seeing Mr. Johnson again?

Suggested Solution:

Tactfully, Miss Jones will tell Mr. Johnson that Mr. Morrow is not interested in buying any bonds at the present time. However, the secretary should point out that Mr. Morrow has Mr. Johnson's name and telephone number and Mr. Morrow can get in touch with him <u>if</u> or <u>when</u> he decides to buy some bonds.

CASE PROBLEM

Who Controls the Files

Objective: The students will be able to analyze the case, discuss the questions suggested, and decide on a possible solution to the situation which will involve approximately 30-45 minutes of class time. Evaluation of the students will be done by the teacher on a 1-5 point scale based on individual participation in the discussion.

Situation:

Jennifer Mason has been working as a secretary for The Motown Records Incorporated for five years. Her secretarial duties vary from day to day. She is responsible for answering the telephone, handling the correspondence, typing, and taking dictation. Along with her other duties, Jennifer must file all materials used by Motown. Miss Mason takes pride in her work and strives to keep a well-organized filing system. She is the person who is authorized to remove materials from the files and to place them back in their proper position. Her boss, Mr. Gordy, constantly goes in the filing cabinet and removes materials without consulting Miss Mason. He also leaves correspondence on his desk or in his briefcase causing Jennifer to search for it so that these items can be filed.

One day, Mr. Gordy needed the files on the preliminary budget. Miss Mason was unable to find the files that Mr. Gordy needed immediately. After being embarrassed by her boss, Jennifer later discovered that he had removed the file folder from the cabinet and replaced the folder behind "P" for preliminary instead of "B" for budget.

When Mr. Gordy arrived at work on the following day, Jennifer had placed a "Keep Out" sign on the front of the filing cabinet. She hoped Mr. Gordy would get the hint.

Questions to be Discussed:

1. Was it appropriate for Miss Mason to place the "Keep Out" sign on the filing cabinet?

2. Should Miss Mason have consulted her boss about the situation?

3. How would you have handled the problem?

Possible Solution:

Speaking from a professional point of view, I think that Miss Mason

should have made it a point to consult Mr. Gordy about his removing materials from the files without her knowledge of his doing so. She should point out to him in a professional manner that he had caused her embarrassment as a result of his filing the preliminary budget behind the wrong guide. Miss Mason should be cordial in telling her boss that she would be more than happy to get the correspondence he needed at any time.

CASE STUDY

Human Relations

Objective: The primary purpose of this case is to help students to appreciate the secretary's position as a liaison between the employer and the outside world. Furthermore, this case should help students to understand the secretary's reponsibility in coping with a difficult situation involving an upset office visitor. This case could be presented after the completion of a unit on the role of the secretary as the office hostess.

Observations: The following are the points of interest the student should look for in this case:

1. How the secretary treats an irate, persistent visitor.
2. How the secretary handles a delicate situation in the office.

The Situation: THE SECRETARY WHO BLEW IT

Rachelle Smith, a 1972 Graduate of the Technical Secretary Curriculum at the Technical Institute of Alamance, was employed as a secretary to Mr. Richard Alvion, the senior partner in the law firm of Alvion, VeLines, and DeSantis. At the Technical Institute of Alamance, Rachelle was a scholarly, dependable, and resourceful student. As a secretary, she was most efficient. Being a gregarious person, Rachelle was an excellent office hostess who made callers feel welcome. On one occasion, however, Rachelle's ability to relate to people was tested.

Ms. Patti Wood, recently separated from Mr. William Wood, a client of Mr. Alvion, entered the office firm in an almost uncontrollable condition. Even before Rachelle could cordially greet her, Ms. Wood demanded in a belligerent voice to see Mr. Alvion immediately. Rachelle explained patiently that Mr. Alvion was in conference with a client and she suggested that Ms. Wood call or make an appointment for later. Furthermore, Rachelle kindly offered her assistance which Ms. Wood emphatically refused. Ms. Wood stated in a hysterical voice that she had learned from a friend that Mr. Wood, the husband from whom she was separated, had started divorce action and she wanted to ascertain if there was any truth to this rumor. She again insisted on talking to Mr. Alvion. At this point Ms. Wood's negative, persistent attitude angered Rachelle. Therefore, Rachelle interrupted Ms. Wood by telling her in a stern voice that she definitely could not see Mr. Alvion now and she strongly suggested that Ms. Wood learn to control her emotions. Ms. Wood left the office immediately even more upset than when she had entered.

Questions for Discussion:

1. What mistakes did Rachelle make?

2. Was Rachelle justified in becoming angry with Ms. Wood?

3. How could Rachelle have avoided the situation ending in this manner?

Possible Solutions:

1. Rachelle's biggest mistake was to lose her composure. Secondly, Rachelle should not have advised Ms. Wood to learn to control her emotions.

2. Maybe Rachelle was justified in becoming angry with Ms. Wood, but she should have tried to avoid speaking harshly to the upset caller. Rachelle should have tried very hard to avoid becoming angry herself. She should have remembered that she is projecting the image of her boss and his firm. Rachelle's anger only served to intensify the situation.

3. There is a possibility that the situation would not have ended with Ms. Wood walking out if Rachelle had allowed Ms. Wood to complete her story without any interruption. Rachelle should have offered sympathy instead of criticism.

# CASE PROBLEM

Situation:

Debbie, a senior in high school, is enrolled in the Cooperative Office Occupations class. She has been assigned to a work station in the office of a local, popular retail firm. Debbie's mother is hospitalized and Debbie's income is needed to help with family expenses.

After a month on the job Debbie has found the office atmosphere and surroundings are not what she expected. Each day just before closing time the office manager and salesmen begin to "party", drinking beer and socializing with the other girls in the office.

Because of her religious training, Debbie has refused to join in the activities and wonders if she should tell anyone about what is happening.

Questions for Discussion:

1. Should Debbie change her attitude and join in the activities so the others won't think she is prudish?

2. Should Debbie talk with the office manager about the problem?

3. Should Debbie mention the incidents to the coordinator even if it means she will probably lose her job?

Additional Comments:

The case problem discussed in this decision-making simulation actually happened several years ago in my Cooperative Occupational class. Debbie (fictitious name, of course) did come to me with her problems.

Because of the nature of the problem and the supposedly high "status" of the firm involved, I included the adminstration of my school in carrying out my decision to terminate the work station. When the father was brought in on the problem he became very antagonistic toward my decision and the position of the school in backing me. However, we stood our ground. Within a couple of weeks, Debbie was placed in another work station for the remainder of the school year.

Approximately one year after the incident, Debbie got in touch with me to tell me how much she appreciated what we had done in this situation, and that even though she didn't understand our position at the time, she did realize how much the outcome had meant to her future. Since her graduation from high school, she has been and still is a private secretary for an attorney.

Solutions to Questions:

1. No. Hopefully the students will realize that to go along with the crowd especially when it goes against ones own beliefs is just not the thing to do.

2. No. In this instance the office manager was the instigator of the parties, so talking to him would only have made matters worse.

3. Yes. The purpose of the case is to instill in the students the relationship that must exist between the student and the coordinator. The coordinator should have previously emphasized to all her students that her role is that of coordinator--not merely instructor--and that problems are a part of her job.

   Debbie was in effect still responsible to the school because she was in the cooperative work program and working under a contract signed by her employer and the school.

CASE STUDY

Decision-Making

Objective: After reading the following case study and giving it thorough thought, the student will be able to arrive at a workable solution to the problem.

Situation:

Your employer asks you to remain after working hours to complete a job that he needs to take with him on an early morning flight to a conference he is attending. Upon his return, he presents you with a rather expensive but suitable gift. What should be your reaction?

Questions:

1. Was the gift necessary?
2. Would you accept the gift?
3. If you accept the gift, how would you express your appreciation?
4. Would you expect a gift every time you work overtime?
5. Would you discuss this incident with fellow employee?

Procedure 1: This case is assigned to a class.

A coordinator is selected. The class studies the case, agrees on the problem, discusses possible solutions, and finally agrees on one solution to the problem.

Procedure 2: In the case of individualized work, a student must work alone on the case.

The student would study the case until it is thoroughly understood. The facts would be analyzed to determine the central problem. A statement of the problem would be put in writing. All possible solutions would be considered and then one solution to the problem would be put in writing.

Suggested Solutions:

1. Even though the gift was not necessary, by all means accept the gift. If you refuse the gift, your employer's feelings could be hurt. It is only a token of his appreciation, and no other meaning should be implied.

2. No formal written thank-you note is necessary. A simple "thank you" when he presents the gift is sufficient. You might mention that you worked late to complete the materials for the conference because you felt it was your responsibility.

3. You would definitely not mention this incident to fellow employees. They could easily misinterpret or misunderstand his reason for the gift or they might expect the same on some other occasion.

CASE STUDY

Decision-Making

Objective: The purpose of this case study is to teach students to approach and handle an adverse situation tactfully.

Behavioral Objective: The student will be able to read and analyze the case study given, and derive at a rational solution within 15 minutes.

Instructions: The student will:

1. Read the case study.
2. Write their answers to the two questions given on the case study.
3. Participate in a class discussion on the case study.

Situation: THE RECEPTIONIST HAS A PROBLEM

The Romar Dress Company located in Washington, D. C., is a large company. A few weeks ago the company hired an attractice receptionist in the sales department, who performs her duties adequately. The receptionist is friendly and several of the girls in the department would like to be friends with her. They, however, discovered that she had halitosis and avoided her as much as possible.

During the lunch hour one day, several of the girls from the sales department were in the cafeteria when a conversation concerning the receptionist developed. The girls were interested in helping the receptionist with her problem, but they didn't know how. At the end of the lunch hour it was decided that each person in the group would think the matter over, and present a solution for discussion the next day.

Questions:

1. Would you tell the receptionist that she has halitosis? (Please explain your reason for answering yes or no.)
2. How would you tell the receptionist that she has halitosis, if you decided to tell her?

Suggested Solutions:

Since the receptionist seems to be a nice person, and wants to be friends with the other employees, she should be told about her

problem. The two suggested solutions are:

1. Select a person from the group who can tell her in a nice way, and confidentially that she has halitosis. The person may also give some suggestions on how to prevent halitosis.

2. A note and a bottle of mouth wash could be mailed to her or placed on her desk when she is out of the office.

# CASE STUDY

## Decision-Making

Objectives: This is a case for class discussion in an office practice class following the study of the secretary's role in making appointments. The objectives are to emphasize the importance of reminding the executive of his appointments and the disadvantage of scheduling Monday morning appointments.

Situation:

Betty Babb is the personal secretary of Mr. Fred Bishop, Marketing Representative for Duke Power Company. Mr. Bishop asked Betty to schedule an appointment for him with Mr. Alister Cook, who is the general contractor in charge of the construction of a new high-rise apartment building. Mr. Bishop very much wants to persuade Mr. Cook to utilize electricity throughout the building for heating, cooking, cooling, etc. Betty called on July 15 and found that the only time Mr. Cook had available was the following Monday morning, July 22, so she scheduled the appointment for 10:30 a.m. She informed Mr. Bishop of the appointment the next day but forgot to remind him before he left the office for the weekend. When Betty arrived at the office at 9:00 Monday morning, Mr. Bishop had not yet arrived, as was often the case, since Mr. Bishop worked out of the office most of the time. At 10:00 Mr. Bishop had still not arrived or phoned and Betty was now very worried. She would like to call or make an excuse for Mr. Bishop but realizes he may have remembered and gone directly to Mr. Cook's office.

Questions:

1. What action should Betty have already taken?

2. What do you think Betty should do now?

Possible Solution:

1. Betty should have reminded Mr. Bishop Friday afternoon of this important appointment. She might also have given Mr. Bishop a written reminder to take home with him. Since she had not done this, after arriving at the office and not finding Mr. Bishop there, Betty might have immediately called his house and then any other location where he might possibly have stopped.

2. Betty might call Mr. Cook's office by 10:15 and explain that Mr. Bishop has not yet arrived at the office; and after the weekend, he may have inadvertently forgotten the appointment, although he did want very much to talk with Mr. Cook. She might add that as soon as Mr. Bishop arrives, she will let him know immediately.

CASE PROBLEM

Situation:

Jennifer is the secretary for Mr. Charles Latham, a salesman in the Data Supplies Company. He is in the home office, and the general sales manager is Mr. T. W. Greene. There is a company switchboard, and Jennifer answers all calls referred to Mr. Latham by the switchboard operator. Mr. Latham has been called to Mr. Greene's office at 1:45 for an important conference.

Problem 1:

Mrs. Latham calls at 1:55 and is insistent upon talking with Mr. Latham, although she admists it is not an emergency. Jennifer knows Mrs. Latham only by having talked with her on the telephone, and secretly Jennifer feels that Mrs. Latham disturbs her husband with petty things too often during the business day. How should Jennifer handle the situation?

Questions:

1. Should Jennifer interrupt the conference? If so, in person or by transferring the call to Mr. Greene's office?

2. Should Jennifer tactfully suggest to Mrs. Latham that it bothers Mr. Latham to be interrupted by personal calls during the business day?

3. Since Jennifer knows that the Greenes and the Lathams are personal friends, should she assume that Mr. Greene would be happy to have the call transferred, giving him a chance to greet Mrs. Latham?

4. Should Jennifer take a message from Mrs. Latham and then go into Mr. Greene's office immediately and give it to Mr. Latham?

5. Is there another course of action Jennifer should take?

Problem 2:

A district sales manager, Mr. Jim Jannus, calls at 2:00. He was scheduled to arrive by plane at 3:00, and Mr. Latham had planned to meet him at the airport, which is a 15-minute drive from the office. Mr. Jannus explains that he caught an earlier flight and asks whether Mr. Latham can come for him or should he take a cab to the office. What action should Jennifer take?

Questions:

1. Should Jennifer transfer the call to Mr. Greene's office, so that Mr. Latham can talk with Mr. Jannus?

2. Should she have Mr. Jannus hold the line and interrupt the conference herself?

3. Since Mr. Jannus has always seemed friendly over the phone (though Jennifer has never met him personally), should she go after him herself?

4. Is there another course of action Jennifer should take?

Possible Solutions:

Problem 1: Jennifer should tell Mrs. Latham that Mr. Latham is in a conference which cannot be interrupted and assure her (Mrs. Latham) that she will have him call her as soon as the conference ends, ascertaining whether Mrs. Latham will be at home or where she can be reached by telephone for approximately the next hour. If Mrs. Latham cannot be reached later by telephone, Jennifer should ask to transmit the message to Mr. Latham.

Problem 2: It would probably be best to have Mr. Jannus hold the line and interrupt the conference herself, letting Mr. Latham and Mr. Greene decide on the course of action, and then relating the information to Mr. Jannus.

# CASE STUDY

Objective: Given all the incoming mail, the student will sort, open and deliver the mail to the proper departments.

Situation:

Miss Jane Johnson, receptionist at the National Association of Mutual Insurance Agents, has been handling incoming mail for years. Each morning she went through the stacks of mail in a routine fashion--sorting, opening, and delivering.

One morning, she opened and read an entire letter before realizing it was personal. She checked the envelope, and sure enough it was marked "Personal". The letter was addressed to Nicholas J. Matthews, Director of Services, one of her favorite employers. Jane was embarrassed, and she felt that she had to go to Mr. Matthews personally to explain her mistake.

Jane talked with Mr. Matthews and he seemed to understand what happened, but she still felt guilty about opening the letter. Jane was also afraid that Mr. Matthews might think that she would mention the contents of the letter to other employees.

Questions:

1. Do you feel that Jane did the right thing by going to Mr. Matthews and explaining the error to him? Why?

2. What would you say was the reason for her mistake?

3. What procedure could have been used to assure that no "personal" mail was opened by mistake?

4. Should you ever discuss the contents of the letter with another employee?

5. What would you have done if you had opened the "personal" letter by mistake? Why?

Procedure 1: The student will work individually and read through the entire case. After the student understands the case, he should write a brief statement defining the problem. Possible solutions should be considered and written down. One solution to the case should be decided upon that will be acceptable, and written down for evaluation.

Procedure 2: Students will work together to solve the problem. The class selects a coordinator. The class reads, studies, and discusses the facts presented in the case. The class reaches an agreement on what the main problem is and discusses possible solutions to the problem. The class reaches agreement on one solution to the problem.

main problem is and discusses possible solutions to the problem. The class reaches agreement on one solution to the problem.

Solution:

Miss Johnson's duties included opening, sorting, and delivering the mail to the proper departments; therfore, she should not have read any of the letter that was addressed to Mr. Matthews. The only time Miss Johnson should read a letter is when the letter is not addressed to anyone. She would need to read the letter then to determine what department to send the letter to.

Miss Johnson should have removed all "personal" letters from the first-class mail stack before she started opening the mail. After accidently opening the letter, she should have sealed the envelope with tape and put a note saying "opened by mistake". Miss Johnson's mind must not have been on the job to have opened the letter by mistake. She should be more careful in the future to be alert and take personal pride in the work she does. Miss Johnson should not have gone to Mr. Matthews to apologize, as this caused further embarrassment for both of them.

CASE PROBLEM

Who Gets the Bank Balance?

Behavioral Objective: You will be able to state and support a logical solution to the problem after becoming familiar with accompanying facts and discussing possible solutions.

Background:

Narrowfabrics, Incorporated, located in Durham, North Carolina, is a manufacturer of elastics and trim. The plant employs twenty-five people in production and two people in the office, a bookkeeper and a secretary/receptionist. Virginia McFayden, bookkeeper, is in charge of administrative and financial duties in the absence of the president. Officers of the corporation include:

President/Treasurer - Sam B. Stratford, Sr.

Vice-President - Sam B. Stratford, Jr. (June graduate in Business Administration, but not yet oriented to the operation of Narrowfabrics, Inc.)

Secretary - Lavinia Z. Stratford (Mrs. Sam B. Stratford, Sr.)

Facts:

1. The plant was closed from July 1 through July 6 for vacation.
2. Annual vacation bonuses were paid on Friday, June 28, in addition to the regular payroll.
3. A bank note in the amount of $5,345.21 was due Monday, July 1.
4. The manufacturer's main supplier of elastic, Universal Braid Corporation, requires payment of current weekly invoices every Tuesday.
5. The present bank balance is $6,003.21

Problem:

Today is Monday, July 8, and plant operations have resumed their normal routine following the week of vacation. At 10 a.m. the loan officer from the bank calls Virginia, quite concerned over not having received payment of note on the due date. The bank representative further states that the note must be paid by 3 p.m. today to satisfy a bank audit now in progress. Also, The Universal Braid Corporation invoice is due tomorrow in the amount of $6,009.91. Mr.

and Mrs. Stratford are on an extended tour abroad; and although they are not due to return to the states until August 1, Mr. Stratford calls Virginia each Friday afternoon. However, a decision must be made today! Who gets the bank balance, Virginia?

Questions:

1. Should Virginia try to get in touch with the vacationing corporation officers?

2. Should Virginia call Sam B. Stratford, Jr.?

3. Should Virginia call Narionation Fabrics, a major account of Narrowfabrics, Incorporated, and try to get an advance check on merchandise to be shipped Friday, July 12?

4. Should Virginia call the bank and ask them for an extension of time in which to pay the already past-due note?

5. Should Virginia call Universal Braid Corporation and ask them for an extended period of time in which to pay the current invoice?

Solution to Questions:

1. No, probably not. This would probably be the first thought to occur to Virginia. However, it would not be feasible to try to get in touch with them since they are abroad. Of course, Mr. Stratford, the president, will call into the office on Friday; but that will be too late for him to render any assistance in making this immediate decision. Therefore, other possible solutions would need to be explored.

2. Possibly. This course of action would be following the chain of command and would be a courteous jesture on the part of Virginia. However, his lack of knowledge concerning the business would prevent his lending any valuable assistance to the making of the decision. And, he would probably tell Virginia that he did not feel qualified to advise.

3. No, probably not. There is a possibility that asking Narionation Fabrics for an advance in payment would indicate an instability image for Narrowfabrics. However, Virginia may have to employ this course of action if nothing else can be decided.

4. Possibly. However, the bank is in a precarious situation while the auditors are checking the books. The loan officer may be willing to work out a plan to help her pay the note; however, the possibility is a little slim in that he has stated the bank's position to Virginia on the telephone. And the note <u>is already past due</u> one week.

5. Yes. This seems to be the best course of action open to Virginia. There exists a very good possibility that since Narrowfabrics enjoys a good payment record with Universal Braid (which is obviously the case as Universal is the major supplier), they will be willing to work with Virginia in the company's present and temporary circumstance. Perhaps they will understand that the plant has lost a week of production to vacations and has had to pay bonuses. Virginia might ask if it is satisfactory to include payment for current invoice with the invoice payment that will be due next Tuesday. Hopefully, this will be acceptable to Universal Braid. If so, Virginia would immediately pay the bank note for $5,345.21. Thus, she has satisfied both parties. If this course of action is not acceptable to Universal Braid, alternative solution #3 may have to be tried.

CASE STUDY

Decision-Making

Procedure: Given a description of an office incident, you will have ten minutes to read it and list the order of priority and the procedure (according to office diplomacy) for handling each situation.

Situation: THE OFFICE CRISIS

You are the secretary-receptionist for the head of an advertising department. It is 2:55 p.m., and you have almost completed a three-page letter which should be put in the 4:00 p.m. mail when the following sequence of events occurs:

At 2:56 p.m. your boss emerges from a conference with the Division Manager and requests that you type his advertisement ideas so that the Division Manager will have a neat copy to take with him when he leaves. He also informs you that this conference will probably last about twenty minutes longer than he had originally planned.

At 2:58 p.m. the advertising consultant who has an appointment for 3:00 p.m. arrives and states that he is anxious to see your boss and hopes that he will not have to wait long because he has a tight schedule. Before you can explain about the conference in progress, the phone rings. Your boss' wife is on line 1 and states that she must speak with her husband immediately! You are about to tell her about the conference when the other line rings. You politely ask the boss' wife if you may place her on hold a moment while you answer the other line. Line 2 is a person-to-person long distance call for you. You assume it is your fiance who has been stationed in Europe for a year and is due to arrive in the states today.

Suggested Priority and Procedure:

1. Inform the operator that Miss X is very busy at the moment and could the caller please place the call again in about a half hour.

2. Apologize to the boss' wife for keeping her waiting and state that her husband is in an important conference. Could she possibly convey a message or have him reutrn the call in a few minutes? If neither of these meets with her approval, dial the boss or hand carry a message stating his wife is on line 1 and needs to talk with him. This might also be the opportunity to remind him his 3:00 p.m. appointment has arrived.

3. Apologize to the consultant for keeping him waiting. Explain that her boss is in a conference, and she is sure he will be finished in less than 15 minutes. Politely ask the consultant if there is anything you can do for him. If he feels that it is too long to wait, offer to reschedule the appointment.

4. Remove the letter you were typing (unless it just needs a line and the closing) and type the advertisement ideas for the boss.

References consulted:

Beamer, Esther Kihn, J. Marshall Hanna and Estelle L. Popham. Effective Secretarial Practices. 4th ed. Cincinnati, Ohio: South-Western Publishing Co., 1962, p. 322.

Hutchinson, Lois Irene. Standard Handbook for Secretaries. 8th ed. New York: McGraw-Hill Book Co., 1972, pp. 463-464.

# IN-BASKET PROBLEMS

General Objective and Overview:

This in-basket is designed to give you the opportunity to determine work priorities and to apply office procedures that you have learned in your business courses.

In determining work priorities, you make decisions about the importance of each form that is on your desk. You will write a brief description of the action you would take with each form.

Here are brief descriptions of the four priorities:

1. Emergency - to be done immediately
2. Important - to be done as soon as possible, usually within the first hour or two
3. Routine - to be done when the emergency and important items are finished but usually done today or tomorrow
4. Hold - may be done later but should try to do this week

In this in-basket you will be given a brief description of your job, an Answer Sheet on which to record your work priorities and the suggested action, and seven forms. You will have ten minutes to examine the materials and record your answers. Read the following directions carefully and then proceed with the in-basket:

1. Check to see that you have Forms 1-7 and an Answer Sheet. Each form is numbered at the right near the bottom of the sheet. DO NOT READ THE BUSINESS FORMS YET.

2. Examine the Answer Sheet. Read the directions given at the top very carefully.

3. Memorize the descriptions of the four priorities (or lay this sheet on your desk so that you may refer quickly to the descriptions).

4. Ask your instructor to start timing you - you have 10 minutes to complete this in-basket.

   a. Do not ask your instructor or others any questions while you are involved in making your decisions about the work priorities or the procedures to be used in handling each form.
   b. Do not write on any materials <u>except the Answer Sheet</u>.
   c. When the 10 minutes are up, turn in your materials to the instructor and go over your responses together.

Behavioral Objective:

The behavioral objective is to be able to determine work priority by making decisions about the importance of each form in an in-basket. To do this the student must decide whether each form has first, second, third, or fourth priority and describe the procedure or action to take with each form. Given seven forms the student must correctly determine this priority for six forms out of seven in ten minutes.

Situation:

You are the secretary of John Barnhart, a branch office manager of National Office Supplies. You handle all the office routines.

Mr. Barnhart is on a business trip for the week of July 15-19.

It is now 8 a.m. on July 15, and you have just arrived at the office. There are seven items or forms on your desk this morning.

1. Examine each form.

2. Record your decision about work priority (1-Emergency, 2-Important, 3-Routine, 4-Hold).

3. Describe the action or procedure that you would take in handling each one.

REMEMBER YOUR TIME.

ANSWER SHEET

Name _____

Directions:

Read each form quickly but carefully. Decide whether it has first, second, third, or fourth priority and circle the proper number in the second column. In the Action column describe the procedure or action that you would take with each form.

| Form No. | Work Priority | Action or Procedure |
|---|---|---|
| 1 | 1 2 3 4 | |
| 2 | 1 2 3 4 | |
| 3 | 1 2 3 4 | |
| 4 | 1 2 3 4 | |
| 5 | 1 2 3 4 | |
| 6 | 1 2 3 4 | |
| 7 | 1 2 3 4 | |

(S-1)

GREEN-FREEMAN INSURANCE COMPANY

100 Lafayette Road

Long Island City, New York 11104

July 12, 1974

Mr. John Barnhart
National Office Supplies
500 Madison Avenue
New York, New York 10022

Dear Mr. Barnhart:

I understand that our representative Edward Griffith will call at your office Wednesday morning, July 17, to present our plan for automobile insurance for your company.

We belive our plan will offer you full protection at a most reasonable rate. We hope it will meet with your approval.

Cordially yours,

Wallace Freeman

Wallace Freeman
Sales Manager

as

BUSINESS FORM 1

From the Office of

JOHN BARNHART

I will be back late on the 19th.

Cancel my luncheon with Richard Adams at one o'clock this afternoon

JB

BUSINESS FORM 2

(S-1)

GALE STATIONERY COMPANY, INC.

275 Portland Street

Kingston, New York 12401

July 12, 1974

Mr. John Barnhart
National Office Supplies
500 Madison Avenue
New York, New York 10022

Dear Mr. Barnhart:

From time to time we receive requests from schools from different parts of the United States for interesting visual aids for teaching how to plan appropriate and attractive letterheads.

Since you are in the same line of business and no doubt receive similar requests, we are wondering whether you have any suggestions that might help us. Would you be willing to tell us how you meet these requests?

We certainly would appreciate hearing from you.

Very truly yours,

Ronald T. Galle

Ronald T. Galle
President

RTG:st

BUSINESS FORM 3

PROGRAM

State Business Planning Association
Caryle Hotel, Long Island, New York
August 2-3, 1974

The annual convention of the State Business planning Assoc. will be held at the Caryle Hotel in Long Island, Aug. 2-3, 1974.

The speakers are well-known business men who have active interest and participation in SBPA enable them to speak with authority. The topics selected for these talks will help us appraise what we have done, what remains to be done, and how to go about it.

The complete program follows:

Friday, Aug. 2

9:00-11:30 A. M.

Registration

12:00 Noon

Luncheon--Speaker: Lloyd Johnson, Pres. Johnson Corp.

Subject: "Over the Top"

2:30-4:00 P. M.

Speaker: Senator Robert Weston

Subject: "Where do we go from Here"? (a question and answer period will follow)

6:00 P. M.

Dinner--Guest Speaker: Mark Anderson, President, York Stock Exchange

Subject: "What We Don't Know Can Hurt Us"

Saturday, August 3

9:00 A. M.

Organization Breakfast and Visit to Official Exhibits

12:30 P. M.

Luncheon--Speaker: James Boyle, President National Assoc. of Manufacturers

Subject: "Here's How We Can Do It"

BUSINESS FORM 4

(S-1)

GRANT'S PAINT WORKS

82 Salisbury Road

Yonkers, New York 10710

July 12, 1974

Mr. John Barnhart
National Office Supplies
500 Madison Avenue
New York, New York 10022

Dear Mr. Barnhart:

We agree to furnish all necessary material, labor, and compensation insurance to do the following work on second floor locations marked on the enclosed layout.

1. Repairing plaster
2. Washing ceilings, walls, and woodwork
3. Painting walls and ceiling two coats of paint
4. Bleaching oak woodwork where water-stained
5. Touching up spots to make them uniform with balance of trim
6. Varnishing woodwork

The price for this repair work is $1,200. May we hear from you by July 26 whether this offer is acceptable.

Sincerely,

Rudolph Grant

Rudolph Grant
President

rd

Enclosure



BUSINESS FORM 5

From the Office of

JOHN BARNHART

Ive been looking for a quotation I used in a speech several years ago and now can't recall. The quote was from Marshall Field and began something like this: "Twelve things to remember: The value of time. The success of perseverance." and from there on I've lost it. Do you think you could locate it for me by Monday?

BUSINESS FORM 6

(S-1)

S. B. GODDARD & SON COMPANY

15 Prospect Lane

Cleveland, Ohio 44115

July 12, 1974

Mr. John Barnhart
National Office Supplies
500 Madison Avenue
New York, New York 10022

Dear Mr. Barnhart:

We are planning to send one of our representatives to see you with reference to our new line of desk lamps. Do you have many calls for this type of lamp? We believe your sales would increase if you were to add this product to the other type lamps you are selling.

Would Friday, July 19, be convenient for you to discuss this matter with our representative.

Very truly yours,

Robert Graves

Robert Graves
Sales Promotion Manager

RG: ebl



BUSINESS FORM 7

(S-1)

KEY

SUGGESTED SOLUTION

| Form No. | Work Priority | Action or Procedure |
|---|---|---|
| 1 | 1 (2) 3 4 | Call to cancel and set new date |
| 2 | (1) 2 3 4 | Call right now to cancel |
| 3 | 1 2 3 (4) | Draft a letter and consult with Mr. Barnhart when he returns |
| 4 | 1 2 3 (4) | Retype and correct for final approval when Mr Barnhart returns |
| 5 | 1 2 3 (4) | Hold until Mr Barnhart returns |
| 6 | 1 2 3 (4) | Can be done after more important matters taken care of |
| 7 | 1 2 (3) 4 | Call and set a new date |

# IN-BASKET PROBLEMS

## Bookcrafters, Inc.

Objectives: The student should be able to type an agenda from rough draft for reproduction.

The student should be able to use his judgment in deciding the priorities of work assigned.

Situation:

You are secretary for Mr. J. T. Dixon, Sales Manager at Bookcrafters, Inc. Mr. Dixon has gone on a trip to Houston and Atlanta from April 15-18. He has left a copy of his itinerary and instructions that if anything urgent comes up please contact him. Upon arriving to work on April 15, the following work is on your desk. (This work will be found on the next pages.)

Assignment: Take appropriate action on each item by:

1. Indicate on a separate sheet of paper the action you would take on each problem.
2. Number each problem by priority (which one would you do first).
3. Arrange the problems in the proper order from top priority to lowest in priority.

To: Mr. J. T. Dixon, Sales Manager

From: Personnel Director

Subject: Applicant to fill position

Date: April 15, 1974

We have received an application for the position of assistant manager in your department, from Mr. David G. Hudson, 1306 Regency Avenue, Atlanta, Georgia. According to his application he has had a number of years experience in the area of sales.

I thought perhaps this application would be of interest to you. Therefore, I am enclosing his application and personal data sheet for further review.

src

Enclosures 2

Bookcrafters, Inc.
Agenda for Interdepartmental Meeting

April 19, 1974

1. Call to order . . . . . Norman C. Randolph
2. Reading and approval of the Minutes . . . . . Alex Chaldekas
3. Committee Reports
   - Overtime Work . . . . . Nancy Taylor
   - Food Service . . . . . Julianne Johnson
   - Recreational Activities . . . . . Norman C. Randolph
4. Unfinished business . . . . . George LeBlond
5. ~~6.~~ Adjournment

5. New Business
   Presentation of ~~a Proposed~~ Proposal for Improved Hospitalization Plan . . . . - Chester Bielski

Be sure that each Department head receives a copy of this agenda.

The file labels on our active file are worn to a frazzle. Please be sure to do something about it WTD

KEY

Priorities and Action Taken:

1. Memo - Since Mr. Hudson is from Atlanta, I would call Mr. Dixon and tell him about the applicant, give his name, address and phone number.

2. Retype the agenda in the form of a model copy for reproduction. Make the necessary corrections.

3. Type new file labels for file folder.

IN-BASKET PROBLEM

Decision-Making

Objective: The student will be able to arrange the items in order of priority and prepare typed responses to each one, using any references available and appropriate forms, completing the assignment within two hours with percent accuracy.

Situation:

You are secretary to Attorney Wanda McDonald who is a partner in Adams, Ballard, Hannah, & McDonald Law Firm. Attorney McDonald has an urgent appointment at 8:30 a.m. on July 22 and needs the attached items completed upon her return at 10:30 a.m.

Procedure:

1. Arrange the six items in the order of priority in which you would handle them.
2. Indicate the action you would take on each item.
3. Perform each job according to priorities listed below.

| | | |
|---|---|---|
| -----Item No._____ | -----Item No.____ | -----Item No._____ |
| Action taken: | Action taken: | Action taken: |
| -----Item No._____ | -----Item No._____ | -----Item No._____ |
| Action taken: | Action taken: | Action taken: |

Type on letterhead. I will need 6 (S-3) copies for the 10:45 meeting and a file copy. Use copying machine. Address envelope.

---

→ (address)

Dear Mr. Whitfield:

Whitfield vs. Jamison - File No. 6307

The opposing counsel in your accident case wishes to take deposition at 2:30 pm on Friday, July 26, at the office of Burns & Reynolds, 420 Balfour Building, 516 W. Market Street.

Please meet me in my office no later than 1:30 pm on that day so we can discuss your case at length before the deposition starts.

Very truly yours,
Wanda McDonald
attorney-at-law

Mr Robert Whitfield
3780 Bel Este Drive
Greensboro, NC 27403



ITEM NO. 1

From the Office of

WANDA MCDONALD

I will be representing Judge Murray at a meeting in Chicago tomorrow. Call Eastern airlines and make arrangements for me to leave here around 5 this p.m. I can leave Chicago any time after 4 tomorrow.

Reserve a single room for me at Holiday Inn on 16th Street

WM



ITEM NO. 2

- A P P O I N T M E N T S -

July 23, 1974

| TIME | |
|---|---|
| 8:00 | |
| 9:00 | |
| 10:00 | C. Murray (Judge) |
| 11:00 | A. James (attorney) |
| 12:00 | |
| 1:00 | Dr. Sims (dentist) |
| 2:00 | |
| 3:00 | O. J. Halley |
| 4:00 | |
| 5:00 | |

Call and re-schedule my Tuesday appointments for Thursday. Check directory for telephone numbers



ITEM NO. 3

From the Office of

WANDA MCDONALD

The meeting with my partners has been changed from 4 this afternoon to 10:45 this morning. Set up conference room for 6. They will want coffee



ITEM NO. 4

# Agenda for the Meeting

## Date

1. Bids on Construction of new Office Building
2. Whitfield vs. Jamison - File No. 6307
3. Fifth Partner - John C Hittle
4. Changes in Partnership Agreement
5. Fringe Benefits and Salary Increases for Secretaries ~~of the firm~~



ITEM NO. 5

Type a rough draft, double spaced (S-3)

Last Will and Testament of
Joseph Philip Hear

I, Joseph Philip Hear, a resident of the city of Greensboro, State of North Carolina, declare this to be my last Will and Testament, and revoke all former Wills and Codicils.

First - I direct that my just debts and funeral expenses be paid.

Second - I declare that I am married and my wife's name is Joanne Davis Hear; I have two children now living, John Thomas Hear and Ralph Charles Hear.

Third - I give, devise, and bequeath all property, real and personal and wherever situated, to be divided into equal portions, one third to my wife, Joanne Davis Hear, one third to my son John, and one third to my son Ralph. In the event my wife (cont)

does not survive me, then her portion is to be equally divided between my sons.

This will and testament is subscribed by me on the eighteenth day of July, 1974, at Greensboro, North Carolina.

I will make needed changes & additions this afternoon



ITEM NO. 6

(S-3)

KEY

Order of Priorities:

Item No. 5

Item No. 1

Item No. 4

Item No. 2

Item No. 6

Item No. 3

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Agenda for the Meeting

July 22, 1974

1. Bids on Construction of New Office Building
2. Whitfield vs. Jamison--File No. 6307
3. Fifth Partner--John C. Little
4. Changes in Partnership Agreement
5. Fringe Benefits and Salary Increases for Secretaries

(S-3)

KEY

ADAMS, BALLARD, HANNAH, & McDONALD LAW FIRM

333 BIRD STREET
GREENSBORO, NC 27403

WANDA McDONALD
ATTORNEY-AT-LAW

July 22, 1974

Mr. Robert Whitfield
3780 Bel Estes Drive
Greensboro, NC 27403

Dear Mr. Whitfield:

WHITFIELD VS. JAMISON--FILE NO. 6307

The opposing counsel in your accident case wishes to take deposition at 2:30 p.m. on Friday, July 26, at the office of Burns & Reynolds, 420 Balfour Building, 516 West Market Street.

Please meet me in my office no later than 1:30 p.m. on that day so we can discuss your case at length before the deposition starts.

Very truly yours,

Wanda McDonald

Wanda McDonald
Attorney-at-Law

bjm

(S-3)

KEY

From the Desk of the

SECRETARY

All arrangements have been made for your 10:30 meeting this morning.

bjm

FLIGHT AND ROOM RESERVATIONS

Monday, July 22, 1974

| | |
|---|---|
| Greensboro to Chicago: | Eastern Airlines, Flight No. 813<br>Departs Greensboro at 4:45 p.m.<br>Arrives Chicago at 5:30 p.m. |
| Room Reservation: | Single room at Holiday Inn<br>16th Street, Chicago<br>(Will hold reservation until 7 p.m.) |

Tuesday, July 23, 1974

| | |
|---|---|
| Chicago to Greensboro: | Eastern Airlines, Flight No. 312<br>Departs Chicago at 5:30 p.m.<br>Arrives Greensboro at 6:45 p.m. |

LAST WILL AND TESTAMENT OF JOSEPH PHILIP LEAR

I, JOSEPH PHILIP LEAR, a resident of the city of Greensboro, State of North Carolina, declare this to be my Last Will and Testament, and revoke all former Wills and Codicils.

FIRST: I direct that my just debts and funeral expenses be paid.

SECOND: I declare that I am married, and my wife's name is JOANNE DAVIS LEAR; I have two children now living, JOHN THOMAS LEAR and RALPH CHARLES LEAR.

THIRD: I give, devise, and bequeath all property, real and personal and wherever situated, to be divided into equal portions, one third to my wife, JOANNE DAVIS LEAR, one third to my son JOHN, and one third to my son RALPH. In the event my wife does not survive me, then her portion is to be equally divided between my sons.

This Will and Testament is subscribed by me on the eighteenth day of July, 1974, at Greensboro, North Carolina.

(S-3)

KEY

- A P P O I N T M E N T S -

July 25, 1974

| TIME | |
|---|---|
| 8:00 | |
| 9:00 | |
| 10:00 | Judge C. Murray |
| 11:00 | Attorney A. James |
| 12:00 | |
| 1:00 | Dr. Sims |
| 2:00 | |
| 3:00 | O. J. Halley |
| 4:00 | |
| 5:00 | |

# IN-BASKET PROBLEMS

Objective: Given a set of varied assignments, the student will be able to determine priorities, compose letters and type them in mailable form, make decisions in the absence of the employer, make appointments, use the telephone effectively, apply a payment to a customer's account, and acquire an awareness that social activities are occasionally combined with business activities by using any reference materials the student chooses through trial effort and class discussion.

Situation:

Dr. Russell is your employer. She came in early today and has placed some work on your desk as she will be at the hospital for most of the day.

Procedure:

1. Read all the papers.

2. Decide in what order you would do the work. Is some more urgent than others? Number from 1-5 in the order you choose to do your work.

   _____ Check

   _____ Cancelling appointments

   _____ Temporary secretary

   _____ Letter and envelope to Phil N. Better

   _____ Statement for taxes and envelope

3. In the space provided write a description of what you would do.
   Check

   Cancelling appointments (include what you would say on the phone)

   Temporary secretary (include what you would say on the phone)

4. Your teacher will provide you with the supplies for the typewriting assignments. The work should be mailable.

5. After you have completed the work, place the typewritten portion on the teacher's desk. You will have two class periods to complete the assignment.

6. The following day, you will participate in class discussion arriving at the best solution to the remaining work.

7-14-74 (S-4)

The Director's secretary called me at home last evening. Problems have arisen that will make our staff meeting longer than usual. Cancel my afternoon appointments. Reschedule them. All probably be in before you leave this afternoon

DR.

---

Check with one of those temporary help businesses and get someone lined up to take your place while you're on vacation next month.

(S-4)

APPOINTMENTS

JULY

14

1974

| | | |
|---|---|---|
| AM | 9:00 | Staff meeting at hospital |
| | 9:30 | |
| | 10:00 | |
| | 10:30 | |
| | 11:00 | |
| | 11:30 | |
| | 12:00 | |
| PM | 12:30 | |
| | 1:00 | James Kyle |
| | 1:30 | Jerry Dunn |
| | 2:00 | Cynthia Black |
| | 2:30 | Shirley Moser |
| | 3:00 | Mildred Best |
| | 3:30 | Irene McAuley |
| | 4:00 | Walter Raleigh |
| | 4:30 | C.M. DeJager |
| | 5:00 | Harry Goldner |
| | 5:30 | S.R. Timmons |

(S-4)

APPOINTMENTS

JULY

29

1974

| | |
|---|---|
| AM 9:00 | Helen Johnson |
| 9:30 | C J Habosky |
| 10:00 | Ronald Jones |
| 10:30 | Frank C. Friday |
| 11:00 | Scott Lewis |
| 11:30 | H. M. Sasmick |
| 12:00 | |
| 12:30 | |
| 1:00 | Larry Hauser |
| 1:30 | Daniel Young |
| 2:00 | J. B. McLauran |
| 2:30 | J. Matthew Davis |
| 3:00 | Alfred Baxter |
| 3:30 | Tracy Callahan |
| 4:00 | Alexander Dumas |
| 4:30 | ~~Greg Stewart~~ Billy Sales |
| 5:00 | Bonnie McDaniels |
| 5:30 | Martha Sommers |

(S-4)

BARKER-MAVIS PHARMACEUTICALS

Howard Ewe, President
912-799-3232

7744 Pine Street
Atlanta, GA 42902

July 12, 1974

Dr. Dorothy Russell
3815 Crosland Lane
Winston-Salem, NC 27106

Dear Dr. Russell:

My schedule will put me in your territory on the 29th of the month, and I hope that you will be able to take some time from your busy practice to give me a few minutes. Barker-Mavis is placing a new drug for hypertension on the market early in August, and we want you to be aware of its advantages.

Please let me know when I may talk with you and give you some complimentary samples.

Yours very truly,

Phil N. Better

Phil N. Better
Sales Representative

I'd like to meet with Phil on the 29th. See what you can do and write him for me. Let me know what you work out.

DR

234 Link Lane
Winston-Salem, NC 27012
July 12, 1974

Dr. Dorothy Russell
3815 Crosland Lane
Winston-Salem, NC 27106

Dear Dr. Russell:

You will recall that you advised me to have an air conditioner installed for my health. As we wish to use the cost as a tax deduction, would you please give me a statement indicating your recommendation.

Your assistance will be greatly appreciated.

Sincerely,

Joyce A. Miller

Ms. Joyce A. Miller

Type this message on a prescription form:

To whom it may concern:
ms. Joyce miller has been receiving treatment for asthma and allergies from me since march, 1979. I recommended the installation of air conditioning in her home for her illness.

Let me sign it and get it in the mail to her. DR

July 12, 1974 9 66-30/512

PAY TO THE ORDER OF Dorothy Russell, MD. $ 38.00

Thirty-eight and 00/100 DOLLARS

STATE EMPLOYEES' CREDIT UNION

PAYABLE AT PAR THROUGH
FIRST-CITIZENS BANK & TRUST COMPANY
RALEIGH, N. C.

086

MEMO on account

W. C. Hanks

⑆0512⑈0030⑆

Solution: Letter requesting appointment. The student may submit other acceptable solutions.

DOROTHY RUSSELL, M. D.

3815 CROSLAND LANE
WINSTON-SALEM, NC 27106

July 14, 1974

Mr. Phil N. Better
Sales Representative
Barker-Mavis Pharmaceuticals
7744 Pine Street
Atlanta, GA 42902

Dear Phil:

In reply to your request for an appointment on July 29, I find that my calendar is filled for that date. I am interested in learning more about your new drug that I have been hearing so much about; therfore, if it is convenient, please meet me at the Carriage House Restaurant on Stratford Road at 12:15 for lunch.

I shall look forward to seeing you.

Sincerely,

Dorothy Russell, M. D.

mi

UNIVERSITY OF CALIF.
LOS ANGELES
DEC 10 1976
CLEARINGHOUSE FOR
JUNIOR COLLEGES

(S-4)

KEY

Solution:

_____ Check

_1_ Cancelling appointments

_____ Temporary secretary

_____ Letter and envelope to Phil N. Better

_____ Statement for taxes and envelope

CLEARINGHOUSE FOR
JUNIOR COLLEGES

The order of the remaining 4 is of little or no importance.

Check

The student should understand that $38 is subtracted from the balance on W. C. Hank's account. Bring out the fact that the cancelled check can serve as the receipt.

Cancelling appointments

Use this situation to teach that full explanations are not always necessary and that is is not wise to use a falsehood in an effort to give an excuse. It would be good if the suggestion to write the telephone numbers beside the name on the calendar should come forth.

Temporary secretary

It is important that the student uses the classified section of the telephone directory in this solution

- - - - - - - - - - - -

Reg. No. AM 1478801

Dorothy Russell, M. D.
3815 Crosland Lane
765-3733 Winston-Salem, NC 27106

Name Ms. Joyce A. Miller Age _____

Address 234 Link Ln., Winston-Salem, NC 27012 Date July 14, 1974

℞

To whom it may concern:

Ms. Joyce Miller has been receiving treatment for asthma and allergies from me since March, 1973. I recommended the installation of air conditioning in her home for her illness.

Label _____
Refills ____

Dorothy Russell M.D.